

PORTRAIT OF AMERICAN TRAVELERS®

Fall 2023

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Methodology

MMGY Global's *Portrait of American Travelers*® deals exclusively with leisure travel. The travel trend information presented in this report was obtained from interviews with 4,515 U.S. adults in August 2023.

This report primarily focuses on those *Likely to Visit Hawai'i*, defined as those who intend to take at least one overnight leisure trip during the next 24 months, have traveled by air in the past 18 months, and likely to visit Hawai'i (4 or 5 on a 5-point scale). There were a total of 758 Likely Hawai'i Visitors. At the bottom of each slide, the "Base" will detail the audience represented in the data.

Respondents were selected randomly and participated in a 20-minute online survey. The sample has been balanced by statistical weighting to ensure the data is representative of all leisure travelers in America.

The four generations of adults surveyed are defined below. Due to the small the number of Silent/GI respondents, we did not include their individual results in this report.

Generation	Age	% of Respondents
Gen Zers	18–24	14%
Millennials	25–40	29%
Gen Xers	41–56	24%
Boomers	57–75	29%
Silent/GI	76+	3%



Key Insights

Key Insights

Hawai'i Tourism Proprietary Questions

- Interest in visiting Hawai'i dropped significantly from last year. This may be a factor of timing, as the Maui fires occurred just before the Fall survey went into the field. This decrease is seen primarily among younger generations, and in those who make more than \$100,000 annually.
- Among those who planned to visit Hawai'i but changed their mind, the most cited reasons for doing so are the costs associated to visit Hawai'i.
- Hawai'i, California and international destinations saw the most significant decreases in past visitation within the past three years.

Traveler Outlook

- Short-term travel plans for Likely Hawai'i Visitors remain the most popular, with nearly four in 10 travelers planning their next leisure vacation within the next three months and three in 10 within the next 30 days.
- While travel intentions remained similar to last year, with Likely Hawai'i Visitors planning to take on average 4.5 trips within the next 12 months, spending intentions continue to increase. While traveler sentiment is still down compared to a year ago, we are seeing increases compared to more recent waves. Concerns surrounding the price of gas and COVID-19 decreased significantly as well, though concerns around inflationary pressure remain high. We will monitor to see if traveler sentiment continues to increase as we move into the holiday travel season.

Key Insights

Where People Want to Visit

- Although still top destinations of interest, nearly all Hawaiian destinations displayed significant decreases in interest from last year. Despite these decreases, interest in the state as a whole was unchanged from this time last year. This survey was fielded in mid-August after the wildfires in Maui started; potentially contributing to these decreases in interest as tourists were asked to refrain from visiting while the destination recovered.

Culinary Travel

- Seven in 10 of Likely Hawai'i Visitors continue to be influenced by the culinary scene of the destinations they choose to visit.
- Authentic cuisine eaten by locals (54%) continues to garner the most interest among Likely Hawai'i Visitors, followed closely by interest in street food/food trucks (53%).
- Recommendations from friends and family (73%) is the most influential source when choosing where to eat and drink in a destination. Other factors, such as travel agent recommendations (54%), digital media (52%) and social media (51%), are influential for just under half of Likely Hawai'i Visitors.

Holiday Travel

- Winter holiday travel plans are similar to last year with two-thirds of Likely Hawai'i Visitors planning to travel for the winter holidays. Travel for Christmas/Hanukkah/Kwanzaa is up significantly compared to last year (64% compared to 61% in 2022).
- These travelers are predominantly planning to take a family leisure vacation (45%) or to visit the homes of friends and family (43%), and the majority are planning to travel less than 500 miles from home (52%) for these trips.

Cruising

- Two-thirds of Likely Hawai'i Visitors are interested in taking an ocean cruise (67%) or river cruise (65%) during the next two years, while 58% are interested in taking an expedition cruise.
- The most popular ocean cruise line brands are Royal Caribbean Cruises (50%), Norwegian Cruise Line (41%), Carnival Cruises (39%) and Disney Cruise Line (37%). The most popular regions to travel are the Caribbean (90%), Europe (83%) and the Mediterranean (81%).

Key Insights

Cruising (continued)

- The most popular river cruise line brand is Viking Cruises (50%), followed by American Cruise Lines (31%), with the most popular regions to cruise being Europe (87%), the United States (81%) and Canada (78%).
- The most popular expedition cruise line brands are Silversea Cruises (34%), Seabourn Expeditions (31%) and Atlas Ocean Voyages (26%). Those interested in expedition cruises are most interested in visiting Alaska (80%) or Norway (78%).
- Price (86%), safety/cleanliness standards (84%) and quality of food (84%) continue to be the most influential factors when selecting a cruise line.

Vacation Motivators and Activities

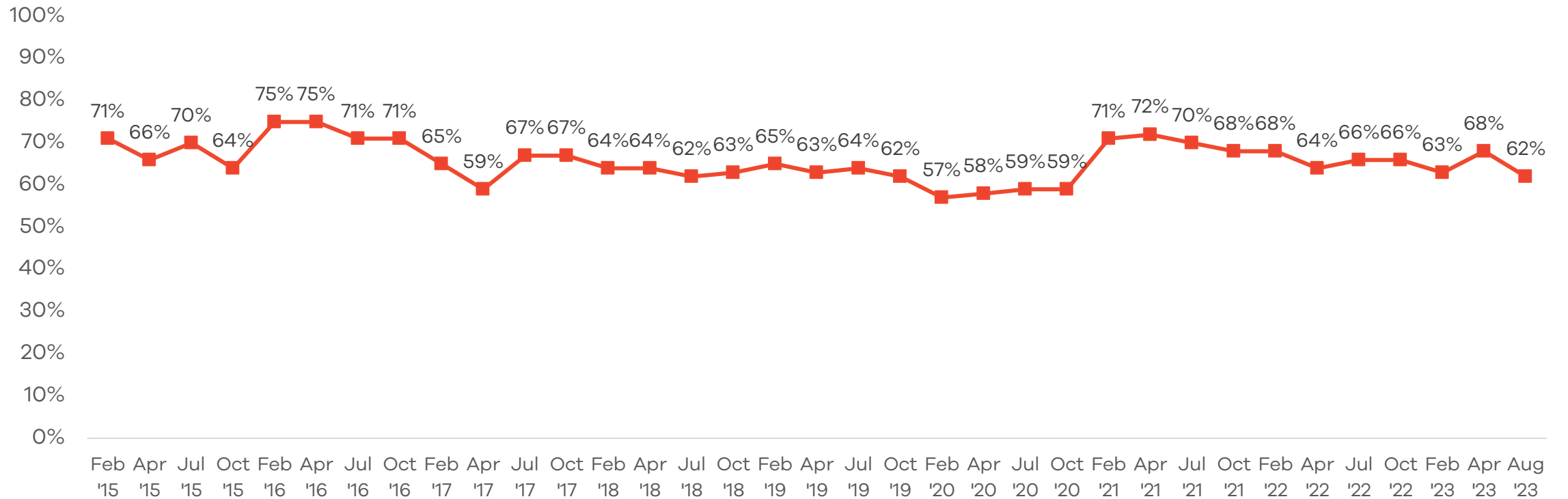
- More than half of Likely Hawai'i Visitors have used ChatGPT or another AI tool for travel planning (53%), primarily to research flight options (48%) and to generate travel ideas and inspiration (47%).
- Beautiful scenery (68%) continues to be the most influential feature when selecting a destination, increasing in influence from last year (64%) for Likely Hawai'i Visitors.

Hawai'i Tourism Proprietary Questions



Interest in Visiting Hawai'i Dropped Significantly this Wave After a Significant Increase in April.

Interest in Visiting Hawai'i Next Two Years
(Top 2 Box)



Hawai'i Tourism Proprietary Questions

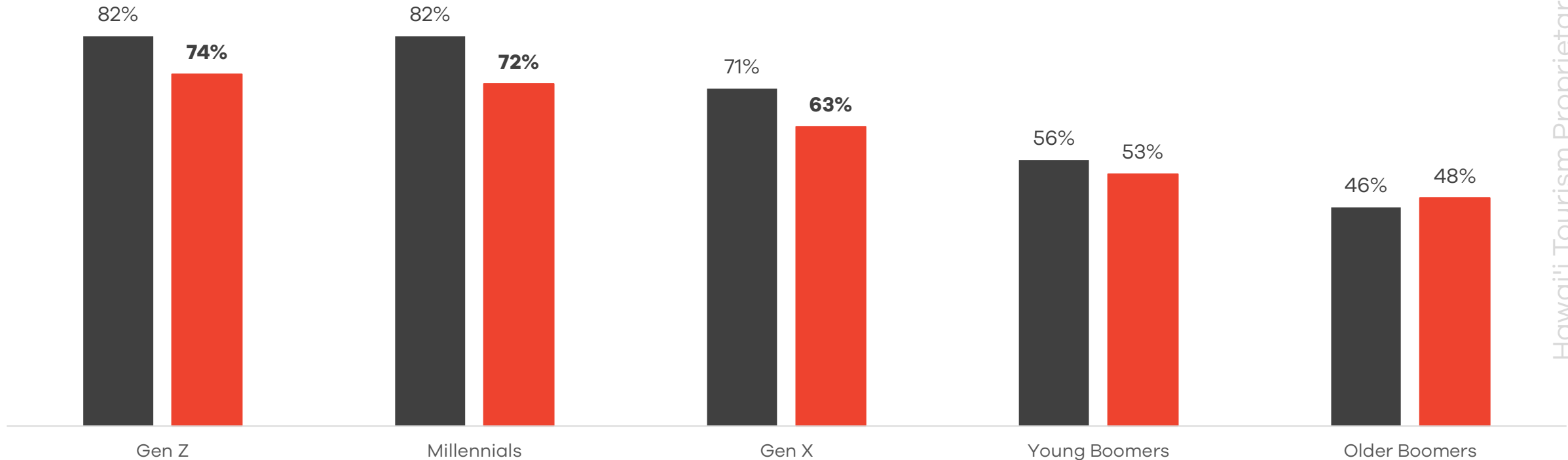
Base: Air Travelers (n=1,767)

Source: MMGY Global's 2023 Portrait of American Travelers® "Fall Edition"

While Interest in Visiting Hawai'i Continues To Be The Highest Among Millennials and Gen Zers, Interest Dropped Significantly Compared to This Time Last Year.

Interest in Visiting Hawai'i By Generation

■ Fall '22 ■ Fall '23



Hawai'i Tourism Proprietary Questions

* Small sample size – Interpret with caution.

Data in bold indicates a significant difference from Fall 2022.

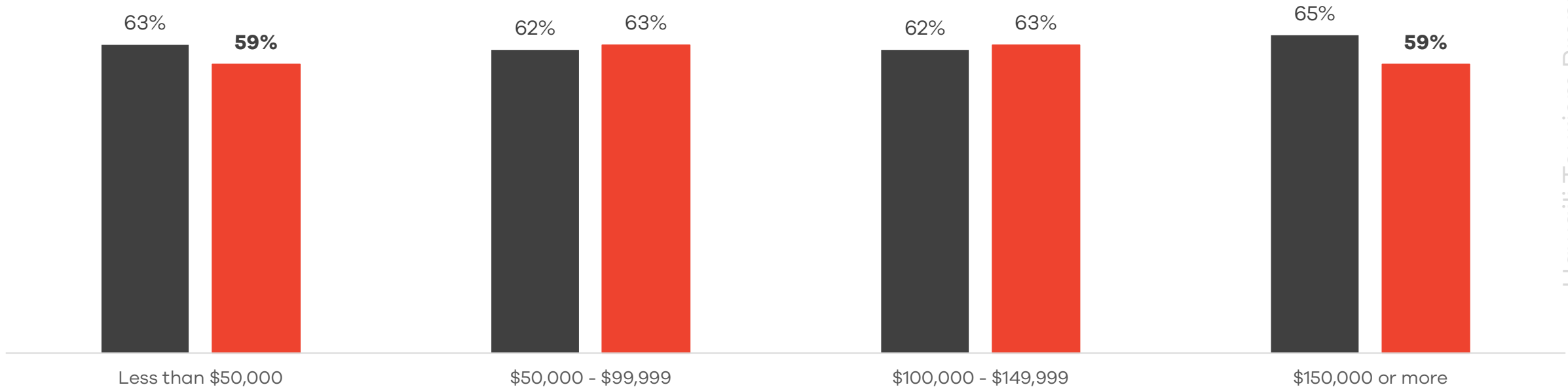
Base: Air Travelers (n=1,767)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Interest in Visiting Hawai'i Has Decreased From Last Year Among Those With Higher Household Incomes.

Interest in Visiting Hawai'i By Household Income

■ Fall '22 ■ Fall '23



Data in bold indicates a significant difference from Fall 2022.

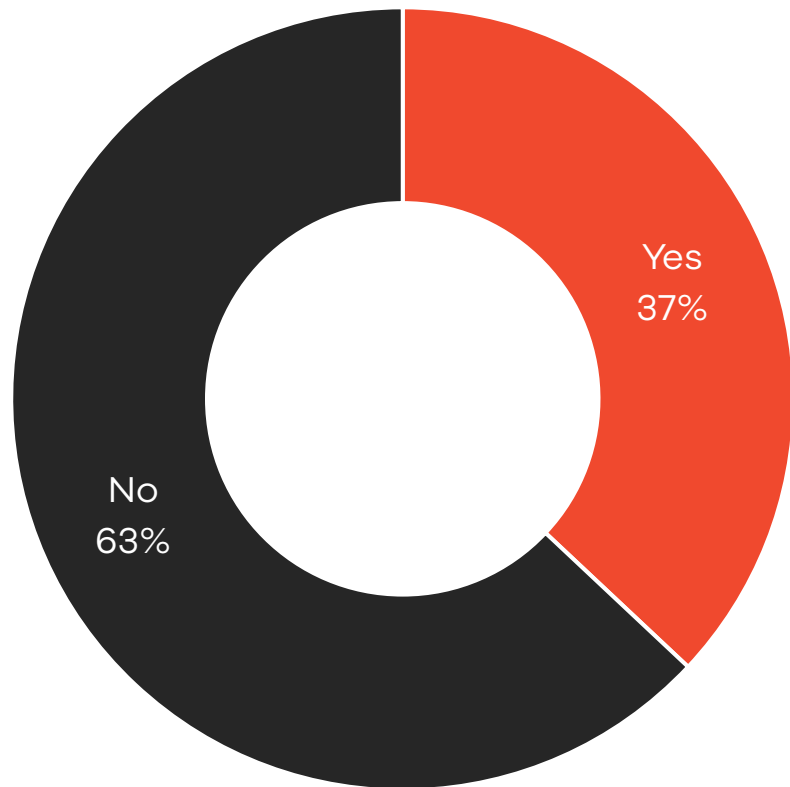
Base: Air Travelers (n=1,767)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Hawai'i Tourism Proprietary Questions

The Cost to Visit Hawai'i Continues To Be The Most Cited Deterrent To Visiting.

Considered Visiting Hawai'i But Changed Their Mind



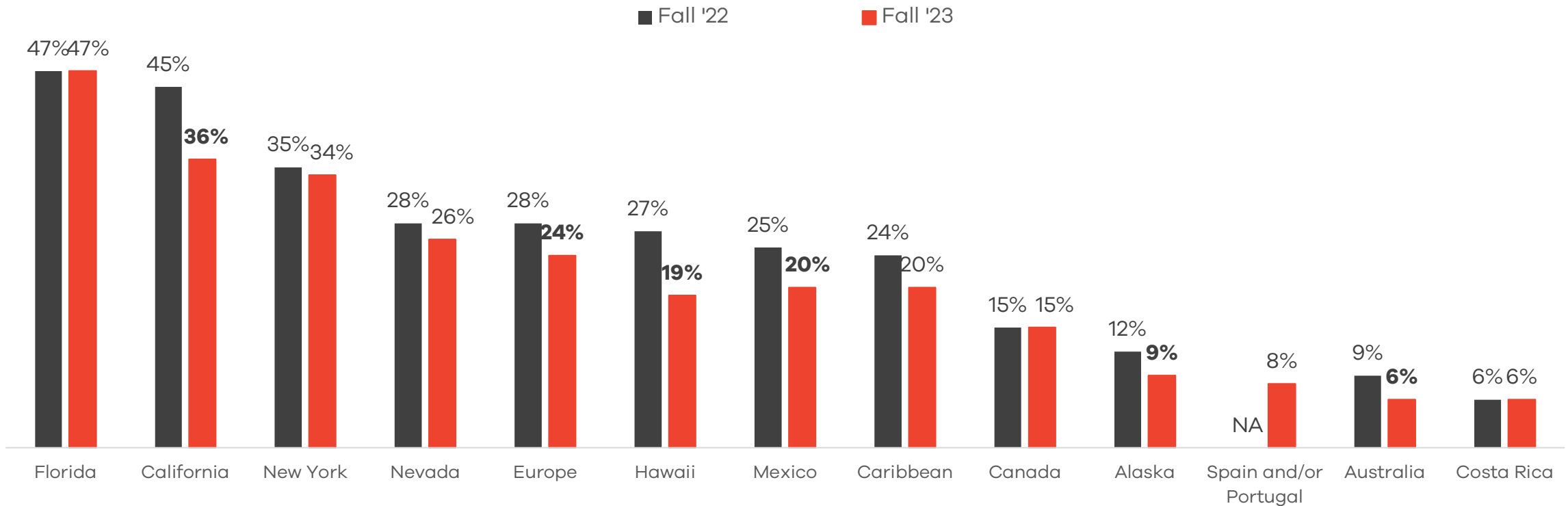
Reasons For Not Visiting Hawai'i – Among Those Who Changed Their Mind	Fall '22	Fall '23
Price of airfare	33%	38%
Price of a vacation package	28%	32%
Price of the hotel	31%	30%
The flight to Hawai'i is too long	29%	24%
Better value at another destination	17%	24%
Concerns about COVID-19 variants	18%	19%
Already been and want to try another destination	11%	17%
Hawai'i's Governor asked people not to travel there	NA	15%
Heard/read that Hawai'i residents don't want visitors	NA	15%
Not enough time to travel to Hawai'i	13%	14%
Hawai'i is too crowded	8%	14%
Hurricanes and tropical storms hitting Hawai'i	8%	12%
Higher quality entertainment at other destinations	NA	12%
Not sure which island(s) in Hawai'i to visit	10%	11%
Heard rental cars limited/not available	NA	9%
Accommodations were not available	9%	8%
Not enough activities in Hawai'i	4%	8%
Hawai'i is not unique enough	6%	7%
Hawai'i is not exotic enough	5%	5%
Not enough dining options at price point	NA	7%

Data in bold indicates a significant difference from Fall 2022.

Base: Air Travelers (n=1,767) & Travelers Who Changed Their Mind (n=584)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Past Visitation To Hawai'i Is Significantly Down from Last Year.

Destinations Visited in Past Three Years
Among Those Likely to Visit Hawai'i



Data in bold indicates a significant difference from Fall 2022.

Base: Likely to Visit Hawai'i (n=758)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Likely Hawai'i Travelers are Most Likely to Book Hawai'i First as Their Next Destination Within the Next Two Years.

Destinations Most Likely to Book in the Next Two Years	U.S. Leisure Travelers	Air Travelers	Likely To Visit Hawai'i
Hawai'i	13%	13%	25%
Another U.S. state	43%	37%	20%
Europe	13%	18%	19%
Caribbean	11%	12%	11%
Mexico	7%	7%	9%
Asia	5%	7%	9%
Oceania	3%	3%	4%
Other	5%	3%	2%

Data in bold indicates a significant difference from U.S. Leisure Travelers
Base: U.S. Leisure Travelers (n=4,515), Air Travelers (n=1,767), Likely to Visit Hawai'i (n=758)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"



The Hawai'i Prospect

Self-Described Personas

	U.S. Leisure Travelers	Likely Hawai'i Visitors
Beach lover	44%	43%
Foodie	36%	40%
Pet lover	40%	38%
Family traveler	36%	38%
Travel bargain hunter	29%	35%
World traveler	19%	33%
Sports fan/enthusiast	27%	32%
Outdoor adventurer	26%	30%
Cruise lover	19%	27%
Theme park enthusiast	22%	27%
Environmentally-conscious	19%	24%
Luxury traveler	15%	24%
Wine enthusiast	16%	24%
Video game enthusiast	16%	23%
Moderate	23%	23%
Conservative	25%	23%
Concert/festival enthusiast	21%	23%
Liberal	18%	22%
All-inclusive enthusiast	18%	21%
Recreational cannabis user	12%	14%
Golf enthusiast	9%	14%
Social justice activist	8%	12%
Ski/snowboard enthusiast	5%	10%
Road warrior	5%	9%

Data in bold indicates a significant difference from U.S. Leisure Travelers

Base: U.S. Leisure Travelers (n=4,515), Likely to Visit Hawai'i (n=758)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Demographics

	U.S. Leisure Travelers	Likely Hawai'i Visitors
Male	48%	63%
Female	50%	37%
Other	1%	0%
Gen Zers	14%	10%
Millennials	29%	41%
Gen Xers	24%	23%
Young Boomers	18%	13%
Older Boomers	12%	9%
Have children under 18 at home	31%	46%
White	73%	70%
Hispanic	17%	18%
African American/Black	14%	12%
Asian	7%	14%
Native American	2%	3%
Pacific Islander	1%	2%
Other	5%	3%

Data in bold indicates a significant difference from U.S. Leisure Travelers

Base: U.S. Leisure Travelers (n=4,515), Likely to Visit Hawai'i (n=758)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Demographics

	U.S. Leisure Travelers	Likely Hawai'i Visitors
Under \$30,000	15%	4%
\$30,000–\$49,999	13%	8%
\$50,000–\$74,999	18%	17%
\$75,000–\$99,999	10%	11%
\$100,000–\$124,999	12%	15%
\$125,000–\$149,999	7%	8%
\$150,000–\$249,999	18%	27%
\$250,000–\$499,999	4%	7%
\$500,000 or more	2%	3%
4 years or less of high school	39%	20%
1–3 years of college	26%	22%
4 years of college	22%	35%
Some graduate school	3%	4%
Graduate/professional degree	10%	18%

Data in bold indicates a significant difference from U.S. Leisure Travelers

Base: U.S. Leisure Travelers (n=4,515), Likely to Visit Hawai'i (n=758)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Demographics

	U.S. Leisure Travelers	Likely Hawai'i Visitors
South	38%	31%
West	24%	33%
Midwest	21%	18%
Northeast	17%	18%
Employed (full or part-time)	55%	74%
Retired	25%	16%
Temporarily unemployed	9%	3%
Homemaker (full-time)	8%	5%
Student	3%	2%
Married/living together	61%	75%
Never married	25%	17%
Divorced/separated/widowed	14%	8%

Data in bold indicates a significant difference from U.S. Leisure Travelers

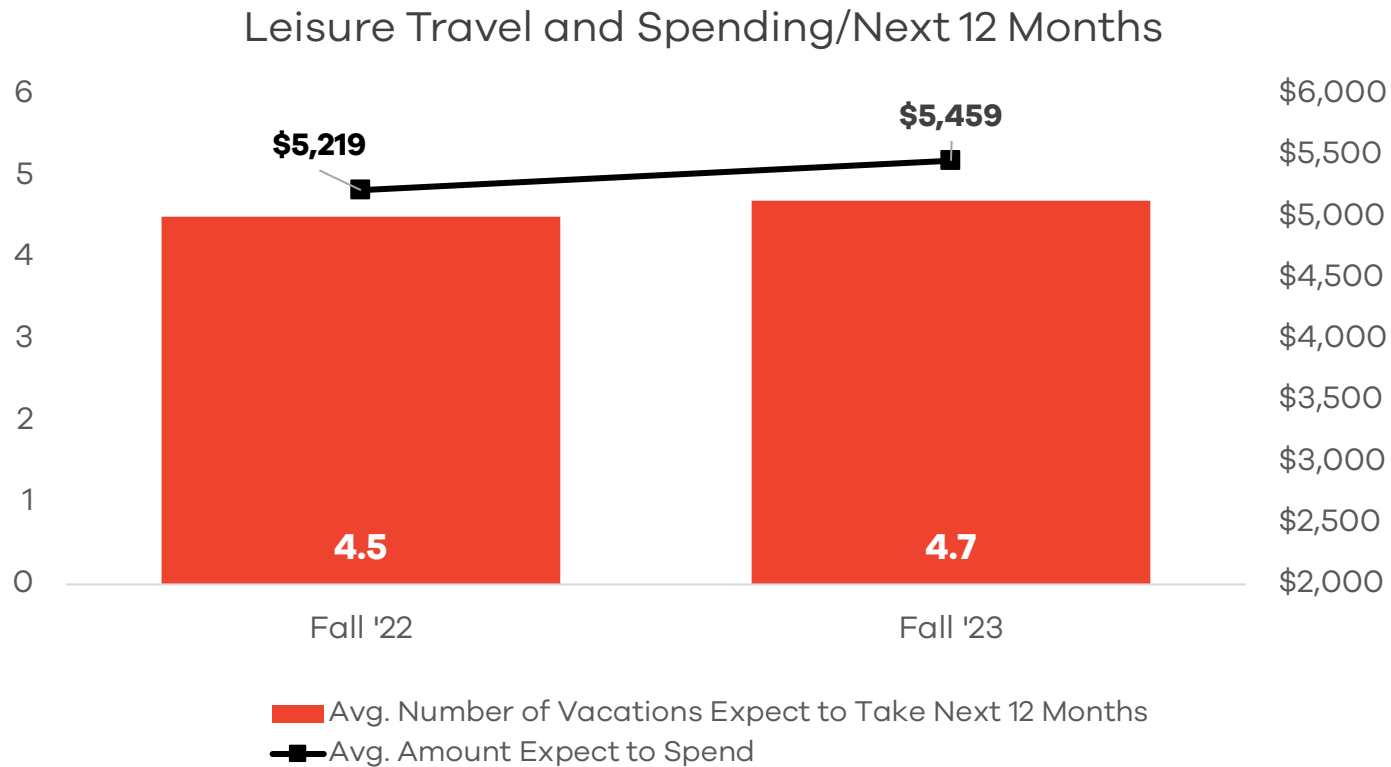
Base: U.S. Leisure Travelers (n=4,515), Likely to Visit Hawai'i (n=758)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"



Travel Outlook Snapshot

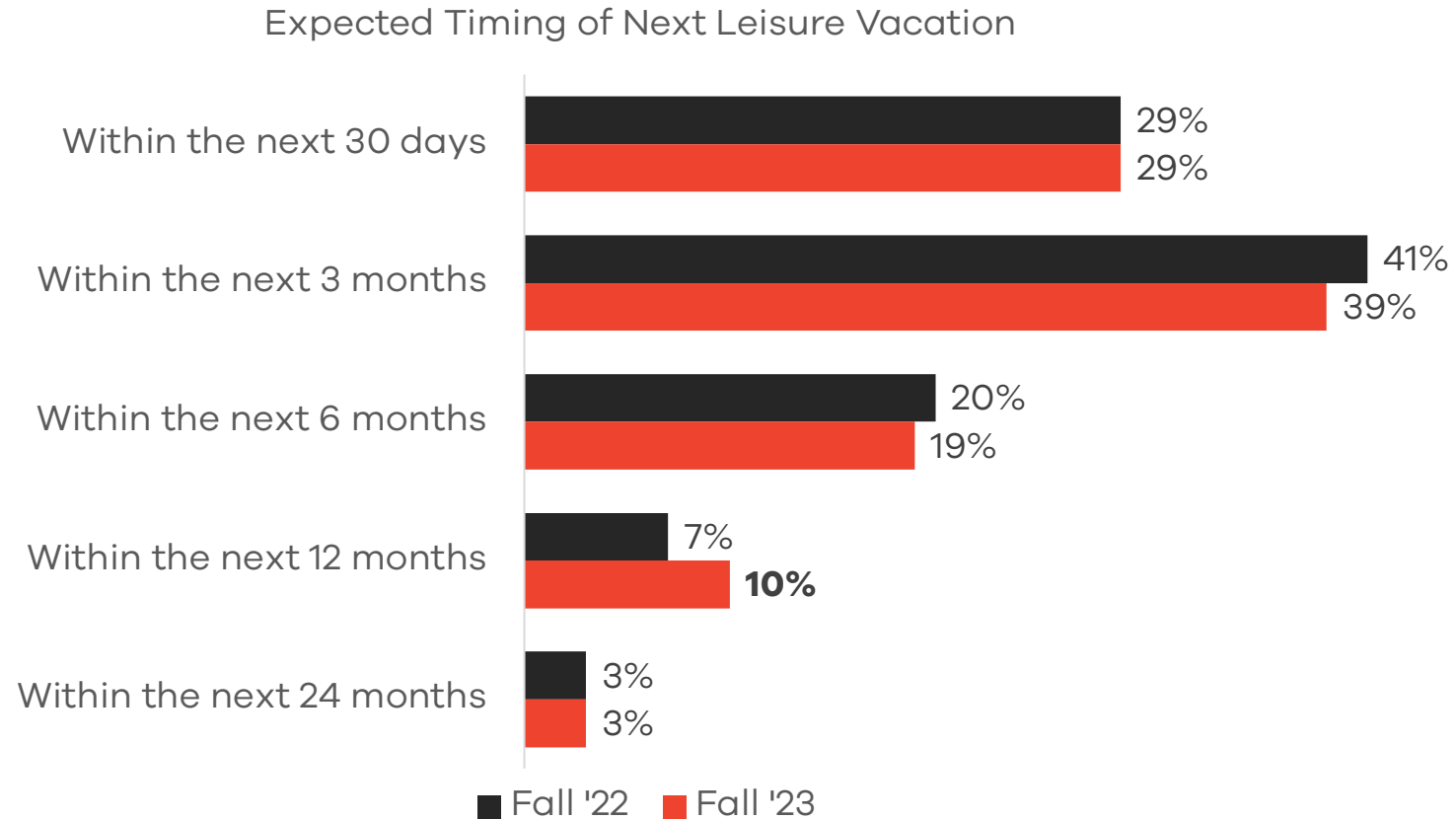
Spending and Trip Intentions Are Up Slightly From Fall 2022.



Spending intentions are up slightly from this time last year. Travelers may be influenced by a combination of rising inflation and longer trips.

Traveler Intentions: Over Time

Travel Intentions Are Similar To Fall 2022.



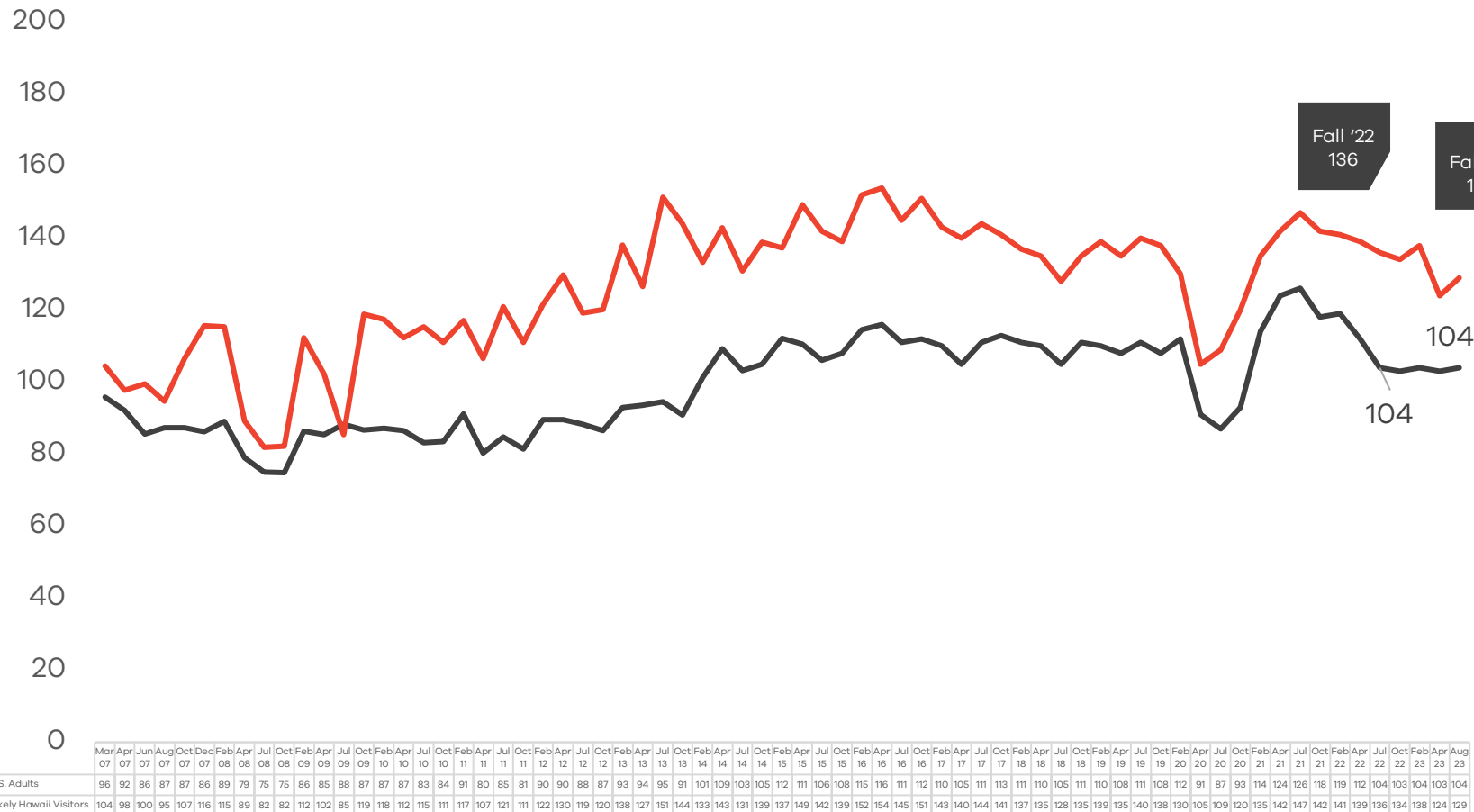
Traveler Intentions: Over Time

Data in bold indicates a significant difference from Fall 2022.

Base: Likely to Visit Hawai'i (n=758)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Overall Traveler Sentiment Score: Down From Last Year But Showing Signs of Increased Sentiment From Last Wave.



The Traveler Sentiment Score consists of six variables, including: interest in travel, time available for travel, personal finances available for travel, affordability of travel, quality of service and safety of travel. It provides a glimpse into how U.S. adults are feeling about travel this year compared to the same time a year ago. MMGY has calculated and reported the TSI quarterly since March 2007; therefore, we are able to compare the indices to February 2020 (pre-pandemic levels) to track how the traveler mindset has changed throughout the COVID-19 pandemic.

Traveler Sentiment Index™

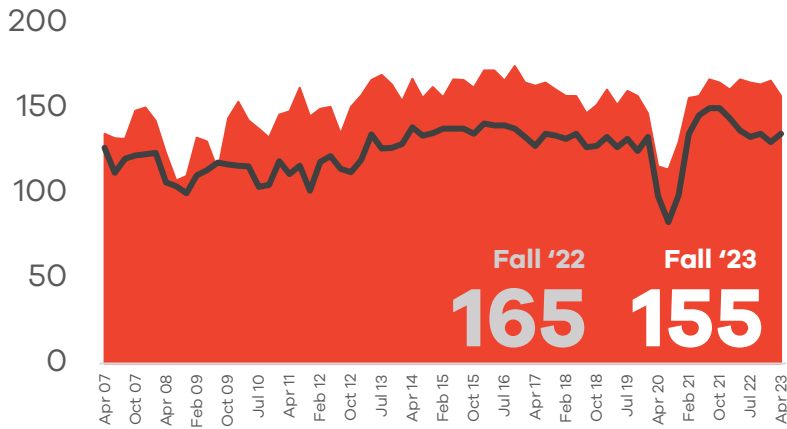
Base: U.S. Adults (n=4,515) & Likely to Visit Hawai'i (n=758)

Source: MMGY Global's travelhorizons™/2023 Portrait of American Travelers® "Fall Edition"

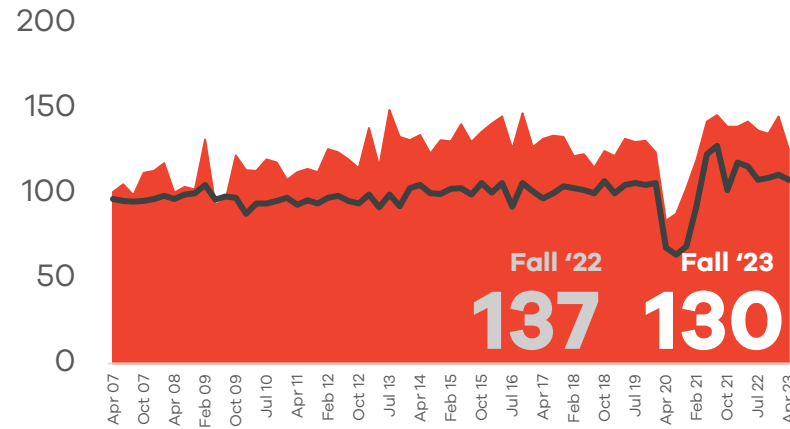


Affordability of Travel Displayed The Largest Decrease From 2022, Though Nearly All Categories Showed Increases From Summer.

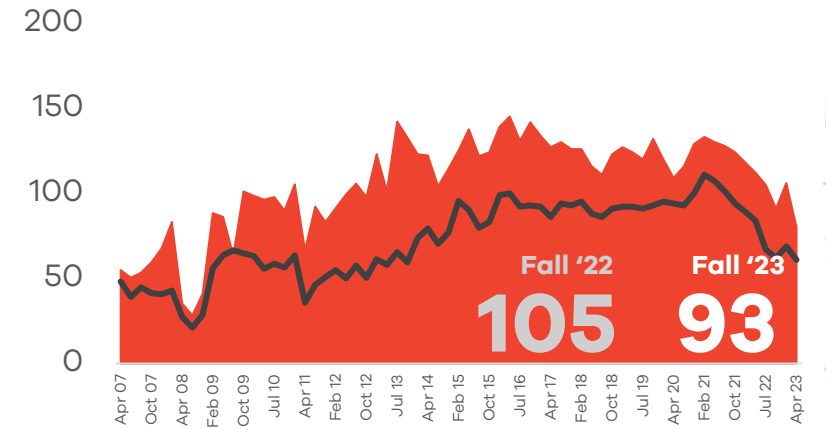
Interest in Travel



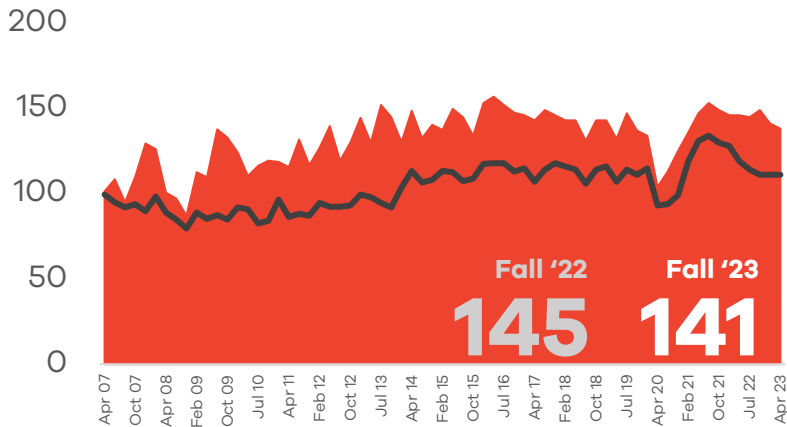
Perceived Safety of Travel



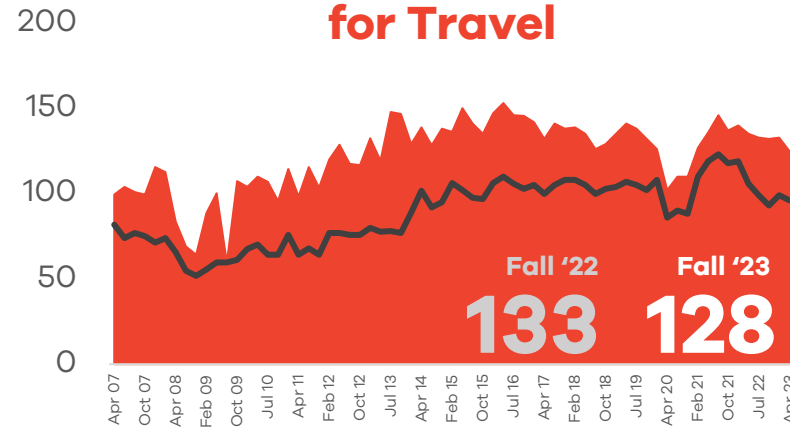
Affordability of Travel



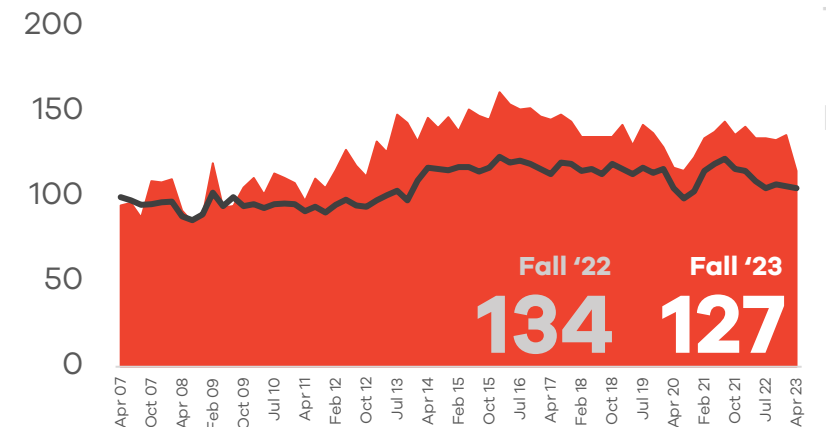
Time Available for Travel



Personal Finances Available for Travel



Quality of Service of Travel



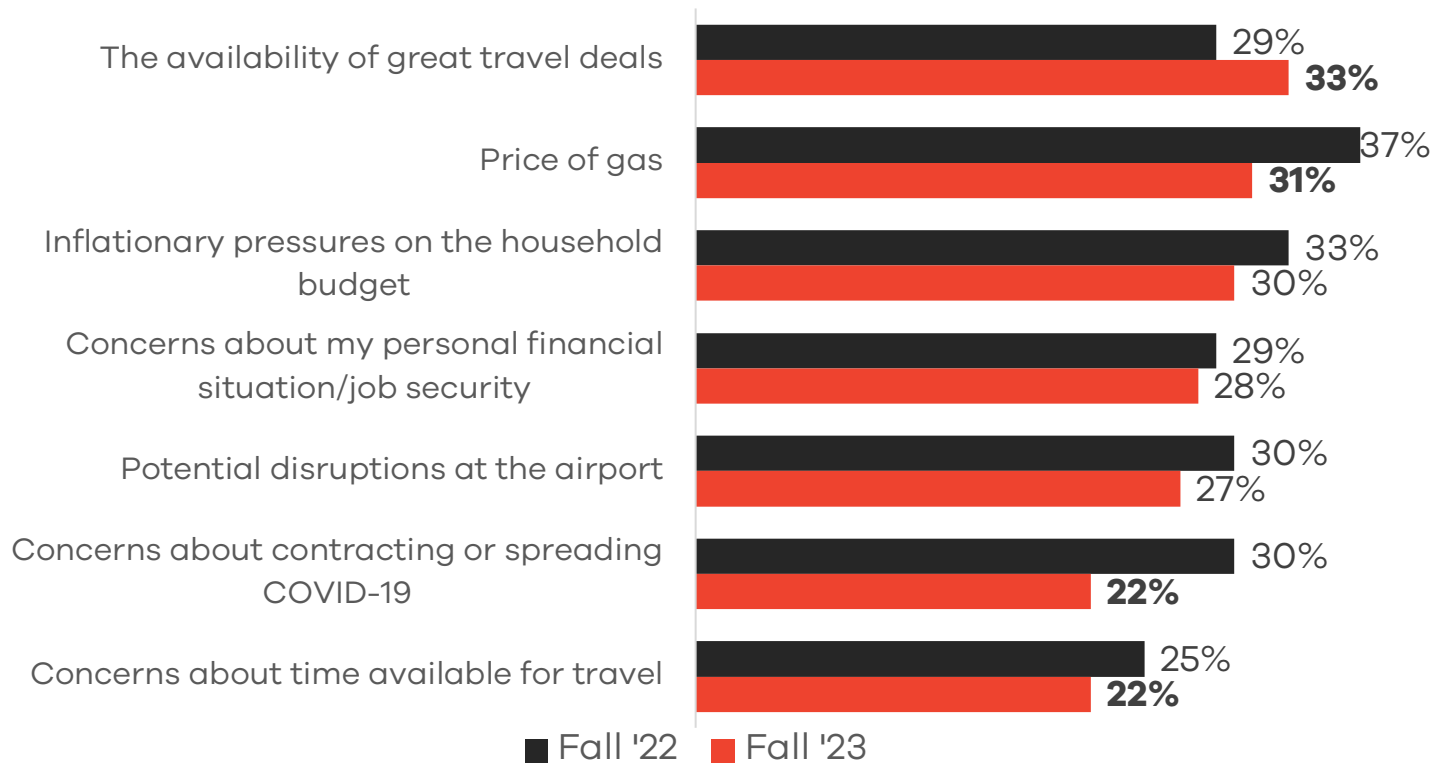
Traveler Sentiment Index™

Base: U.S. Adults (n=4,515) (Black line) & Likely to Visit Hawai'i (n=758) (Red fill)

Source: MMGY Global's travelhorizons™/2023 Portrait of American Travelers® "Fall Edition"

Significantly Fewer Likely Hawai'i Visitors Are Concerned About the Price of Gas.

% Who Are Extremely Impacted By...



/ Likely Hawai'i visitors are less impacted by the price of gas, concerns surrounding contracting or spreading COVID-19 and concerns around time available to travel. However, one-third of likely Hawai'i visitors are extremely impacted by the availability of great travel deals.

Barriers To Travel

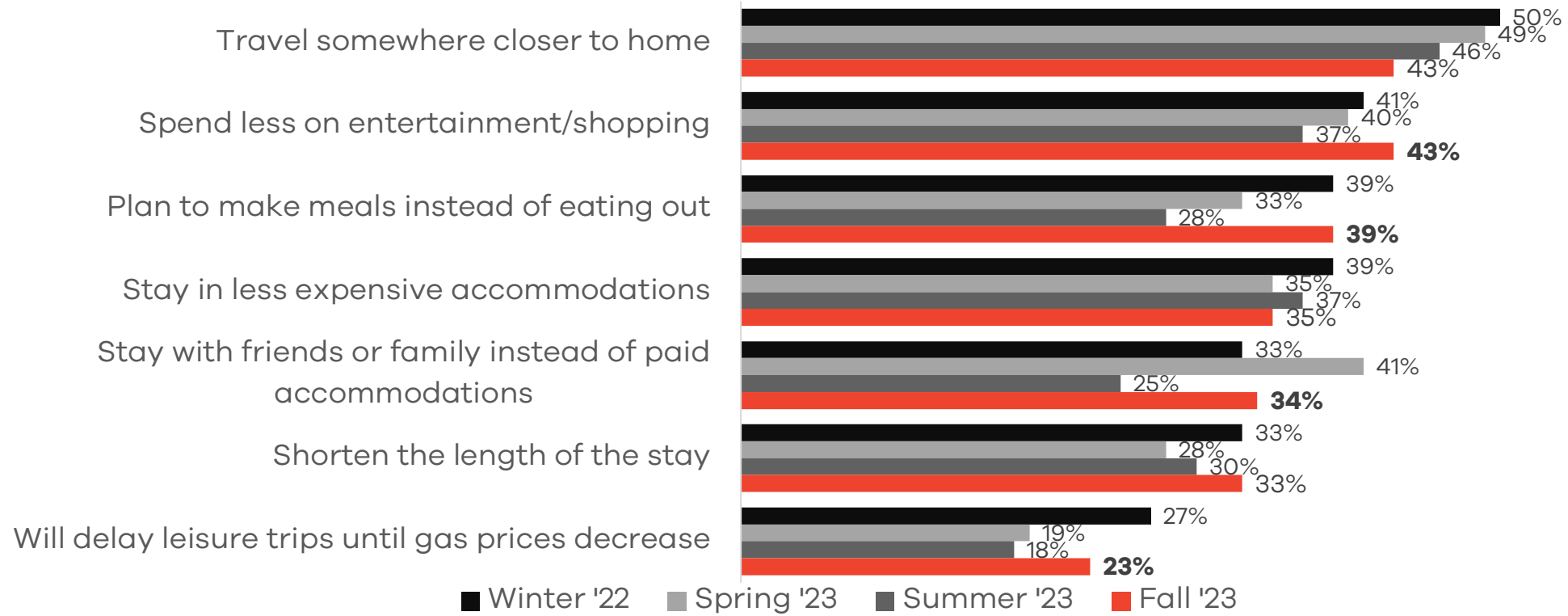
Data in bold indicates a significant difference from Fall 2022.

Base: Likely to Visit Hawai'i (n=758)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Likely Hawai'i Visitors Impacted By Gas Prices Say They Will Travel Somewhere Closer To Home, Followed By Spending Less On Entertainment/Shopping and Plan to Make Meals Instead of Eating Out.

How will the price of gas impact your leisure trips during the next six months?



Barriers To Travel

Data in bold indicates a significant difference from Summer 2022.

Base: At least somewhat impacted by the price of gas & Likely to Visit Hawai'i (n=404)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"



Where People Want to Visit



Travel
Intelligence

California, Florida, Alaska, Colorado and New York Are The Other Top States of Interest Among Likely Hawai'i Visitors.

Top 20 States of Interest	Fall '22	Fall '23
California	73%	74%
Florida	71%	71%
Alaska	65%	68%
Colorado	64%	67%
New York	66%	63%
Nevada	57%	60%
Texas	53%	56%
Arizona	54%	55%
Washington	61%	49%
Georgia	42%	49%
North Carolina	52%	48%
Massachusetts	49%	48%
Tennessee	46%	47%
South Carolina	44%	47%
New Mexico	50%	46%
Oregon	45%	46%
Louisiana	47%	44%
Pennsylvania	38%	44%
Vermont	40%	43%
Maine	50%	42%

Destinations of Interest

Base: Likely to Visit Hawai'i (n=758)

Source: MMGY Global's 2023 Portrait of American Travelers® "Fall Edition"

Data in bold indicates a significant difference from Fall 2022.

Other Than Hawai'i Destinations, Likely Hawai'i Visitors Are Also Interested in Visiting Las Vegas and New York City.

Top 20 Destinations of Interest	Fall '22	Fall '23
Honolulu, HI	82%	70%
Island of Hawai'i	80%	76%
Maui, HI	80%	72%
Kaua'i, HI	78%	69%
Las Vegas, NV	70%	69%
Lanai, HI	NA	66%
New York City, NY	65%	64%
San Diego, CA	65%	62%
Orlando, FL	65%	59%
Los Angeles, CA	58%	59%
Florida Keys/Key West, FL	66%	57%
San Francisco, CA	63%	57%
Miami, FL	62%	57%
Niagara Falls, NY	60%	57%
Palm Springs, CA	58%	57%
Denver, CO	60%	56%
Napa Valley, CA	61%	54%
Palm Beach, FL	59%	53%
Fort Lauderdale, FL	59%	52%
Boston, MA	62%	52%

Destinations of Interest

Base: Likely to Visit Hawai'i (n=758)

Data in bold indicates a significant difference from Fall 2022.

Source: MMGY Global's 2023 Portrait of American Travelers® "Fall Edition"

Significantly More Likely Hawai'i Visitors are Also Interested in Visiting Europe and Canada than this Time Last Year.

International Destinations of Interest	Fall '22	Fall '23
Europe	44%	55%
Canada	32%	43%
The Caribbean	38%	40%
Mexico	35%	32%
Asia	21%	26%
Oceania	17%	23%
South America	21%	22%
Central America	21%	18%
Middle East	8%	11%
Africa	8%	8%

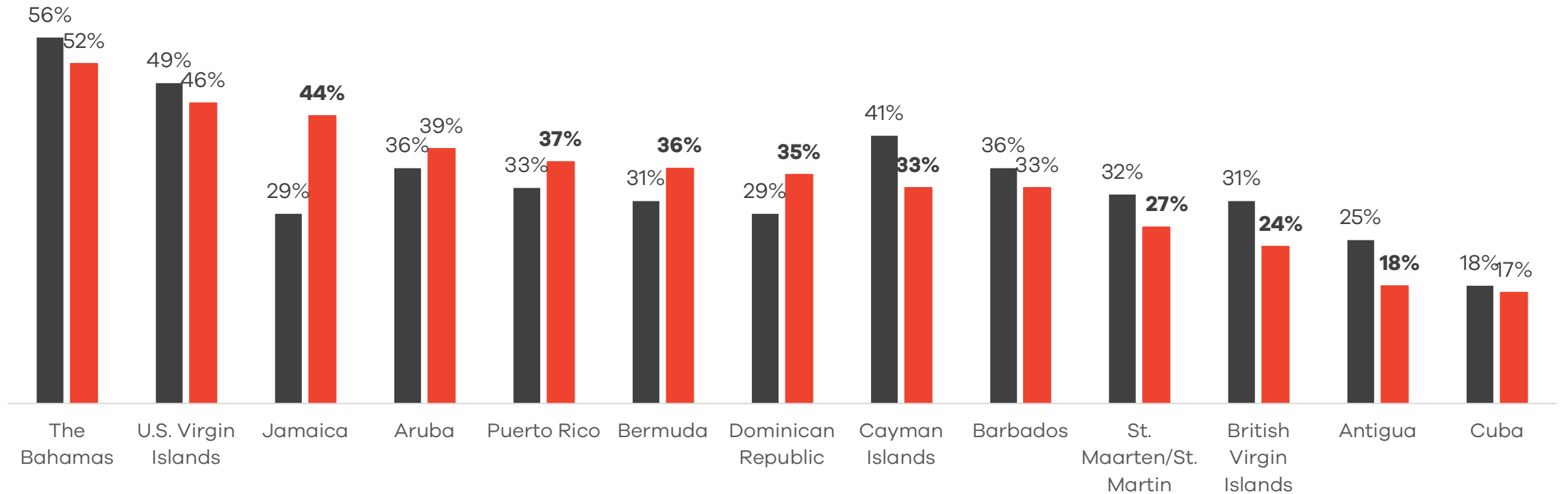
Data in bold indicates a significant difference from Fall 2022.

Destinations of Interest

Interest in Visiting Jamaica Raised Significantly Compared to Fall 2022.

Caribbean Destinations of Interest

■ Fall '22 ■ Fall '23



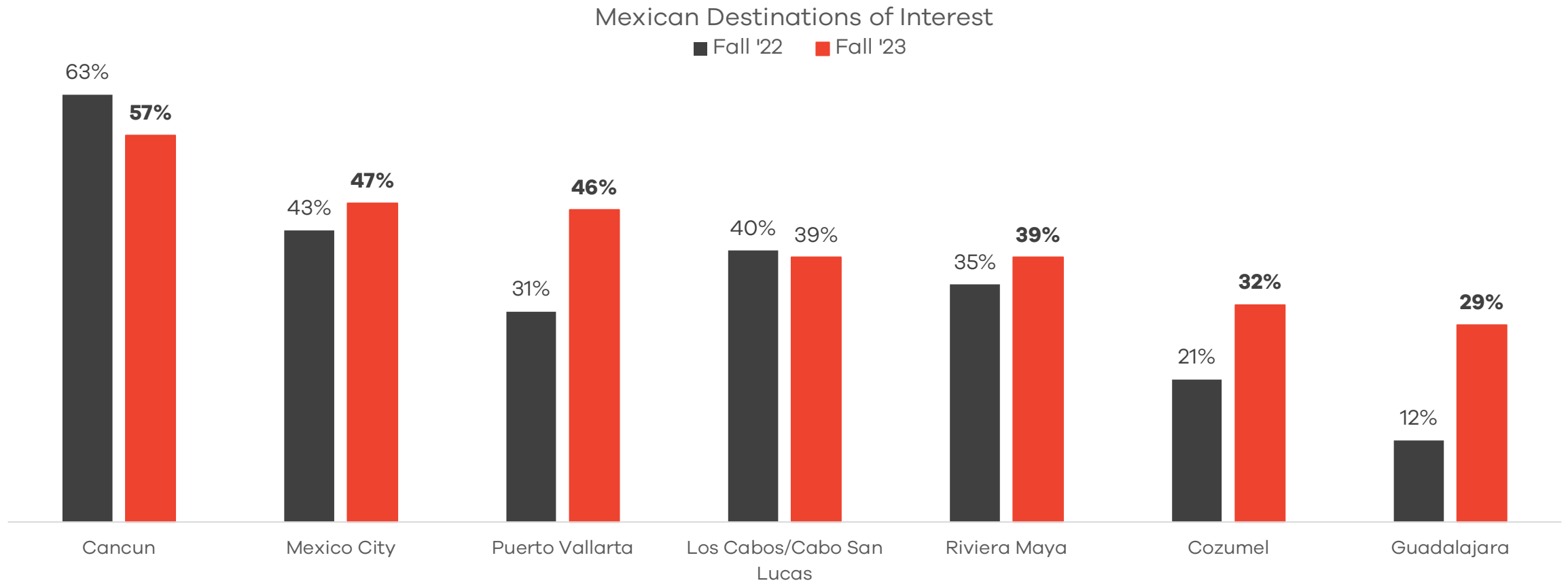
Destinations of Interest

Data in bold indicates a significant difference from Fall 2022.

Base: Likely to Visit Hawai'i & Interested in Visiting The Caribbean (n=304)

Source: MMGY Global's 2023 Portrait of American Travelers® "Fall Edition"

Most Mexican Destinations Rose in Interest Compared to Last Year, With the Most Significant Increases for Puerto Vallarta, Cozumel and Guadalajara.

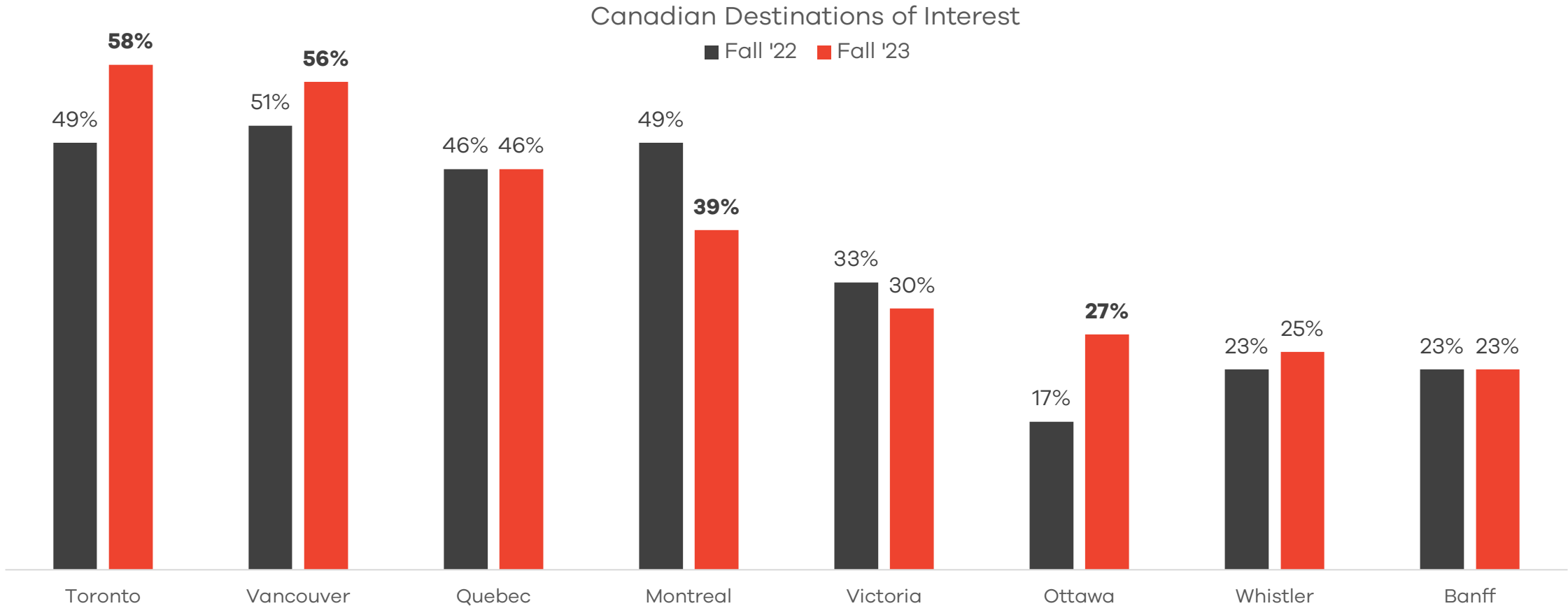


Data in bold indicates a significant difference from Fall 2022.

Base: Likely to Visit Hawai'i & Interested in Visiting Mexico (n=242)

Source: MMGY Global's 2023 Portrait of American Travelers® "Fall Edition"

The Top Canadian Destinations of Interest Are Toronto, Vancouver and Quebec.



Data in bold indicates a significant difference from Fall 2022.

Base: Likely to Visit Hawai'i & Interested in Visiting Canada (n=327)

Source: MMGY Global's 2023 Portrait of American Travelers® "Fall Edition"

Fall Module

Culinary Travel



Similar to Last Year, Seven in 10 Likely Hawai'i Visitors are Influenced by the Culinary Scene when they Choose to Stay in a Destination.

68%
2022

69%
2023

of Likely Hawai'i Visitors are influenced by their perceptions of the quality of the culinary scene when choosing where to stay within a destination. (Top-2 Box)

Culinary Travel

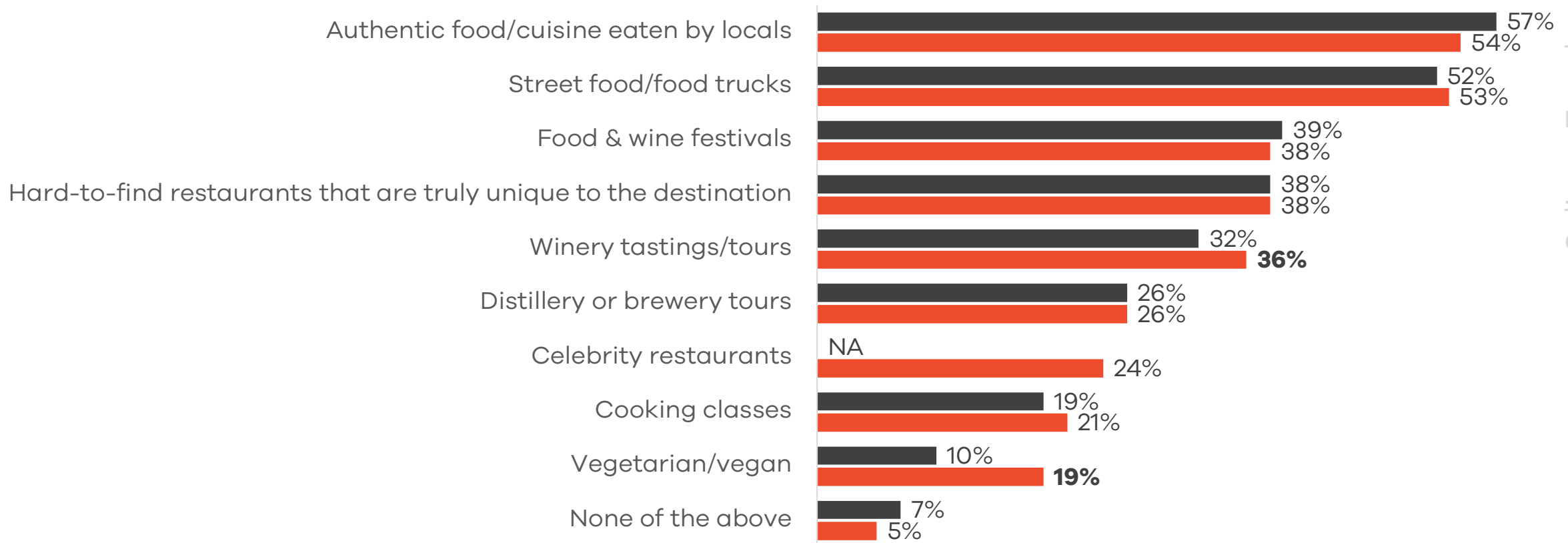
Base: Likely to Visit Hawai'i (n=758)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Authentic cuisine eaten by locals is the top culinary experience of interest, followed by street food/food trucks and food & wine festivals.

Culinary Experiences of Interest

■ Fall '22 ■ Fall '23



Culinary Travel

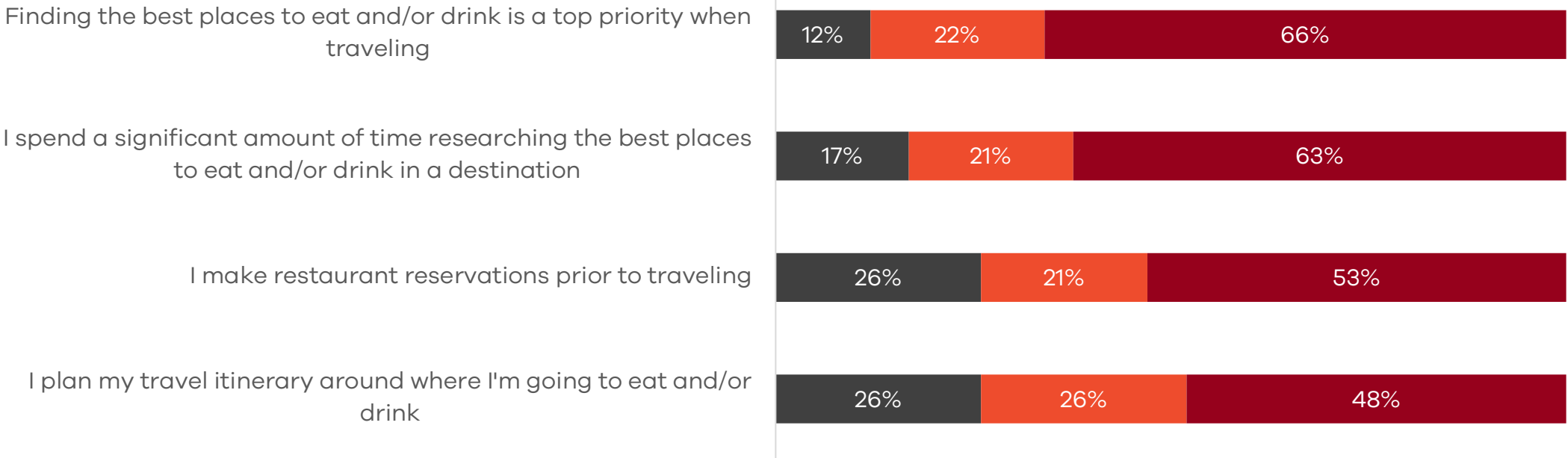
Data in bold indicates a significant difference from Fall 2022.

Base: Likely to Visit Hawai'i (n=758)

Two-thirds of Likely Hawai'i Visitors Agree that Finding the Best Places to Eat and Drink is a Top Priority when Traveling.

To what extent do you agree or disagree?

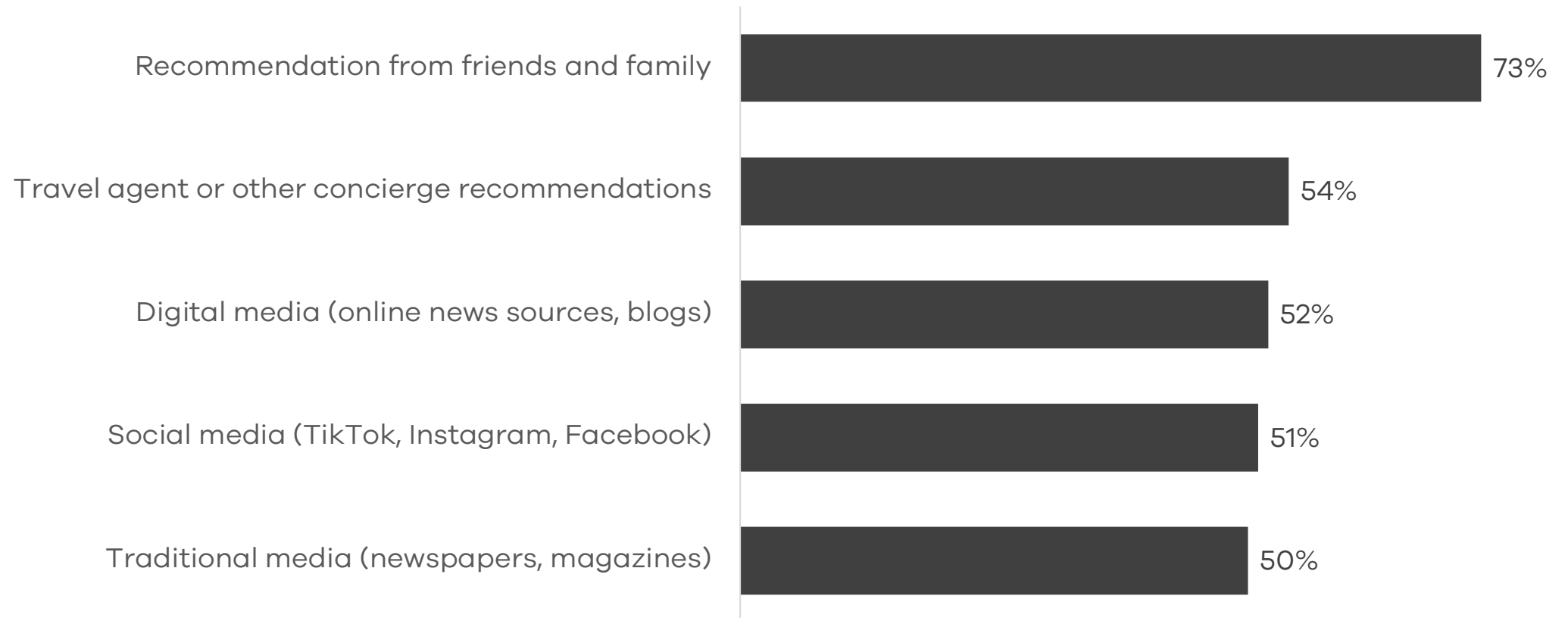
■ Disagree ■ Neutral ■ Agree



Culinary Travel

Likely Hawai'i Visitors Rely Most Heavily on Recommendations from Friends and Family When Choosing Culinary Experiences in a Destination.

Influential Sources for Culinary Experiences



Base: Likely to Visit Hawai'i (n=758)

38 Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

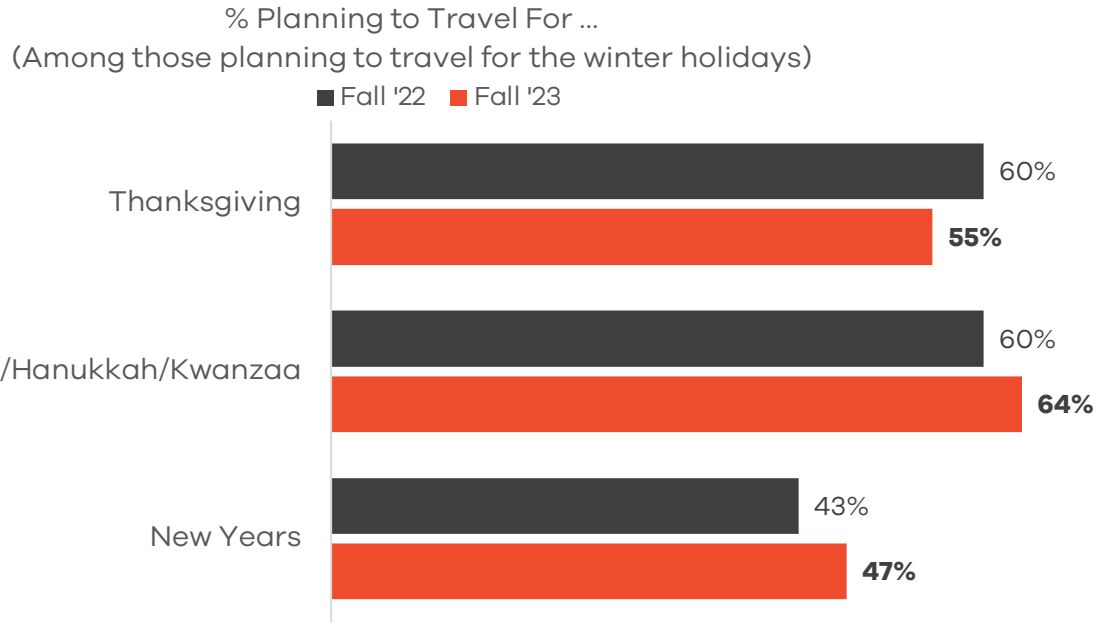
Fall Module

Holiday Travel

Winter Holiday Travel Plans Are Up Slightly From Last Year.

72% 2022 74% 2023

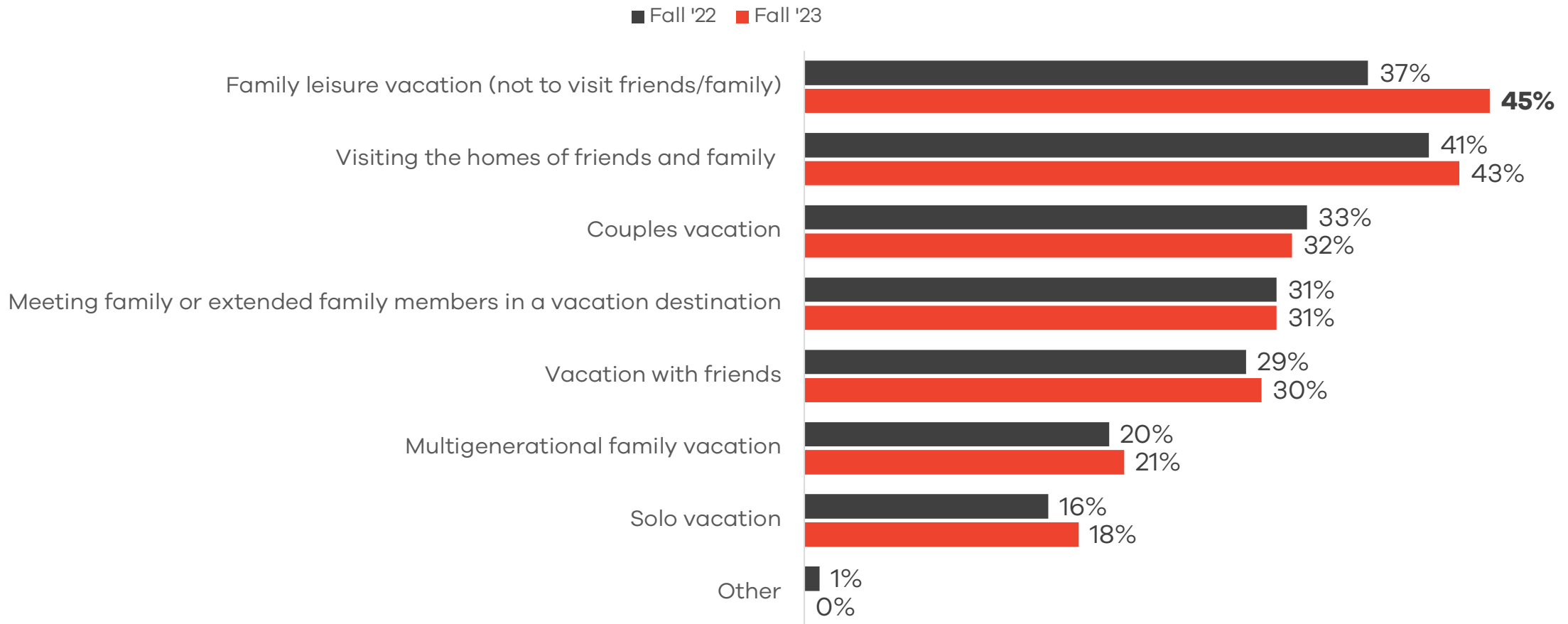
of Likely Hawai'i Visitors are planning to travel for the winter holidays.



Data in bold indicates a significant difference from Fall 2022.
Base: Planning to travel for the winter holidays, Likely to Visit Hawai'i (n=483)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Likely Hawai'i Visitors are Planning on Taking Holiday Trips as a Family Leisure Vacation and to Visit Friends and Family.

Type of Holiday Trip Planning To Take



Holiday Travel

Data in bold indicates a significant difference from Fall 2022.

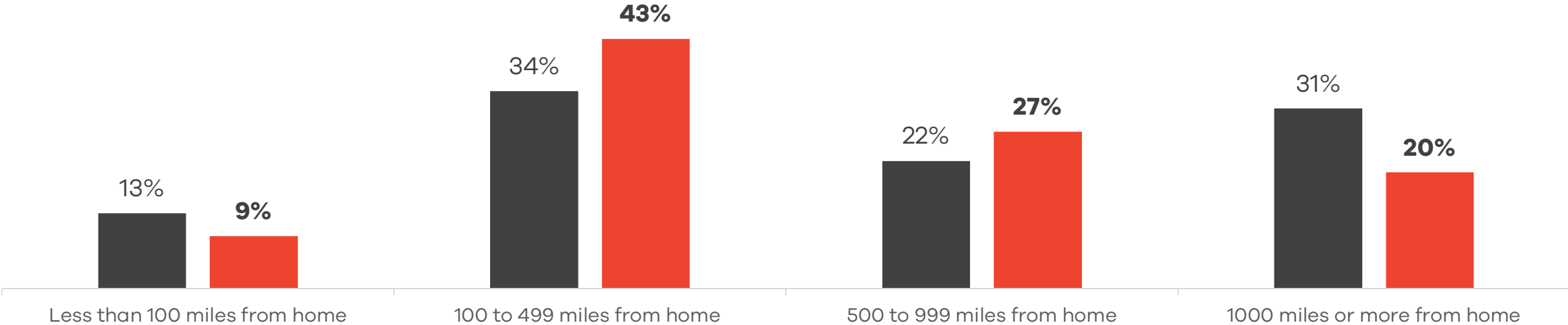
Base: Planning to travel for the winter holidays, Likely to Visit Hawai'i (n=483)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Nearly Half of Likely Hawai'i Visitors who are Planning to Travel for the Holidays Plan to Drive Between 100 and 499 Miles.

Distance Planning to Travel for Holidays

■ Fall '22 ■ Fall '23



Holiday Travel

Data in bold indicates a significant difference from Fall 2022.

Base: Planning to travel for the winter holidays, Likely to Visit Hawai'i (n=483)

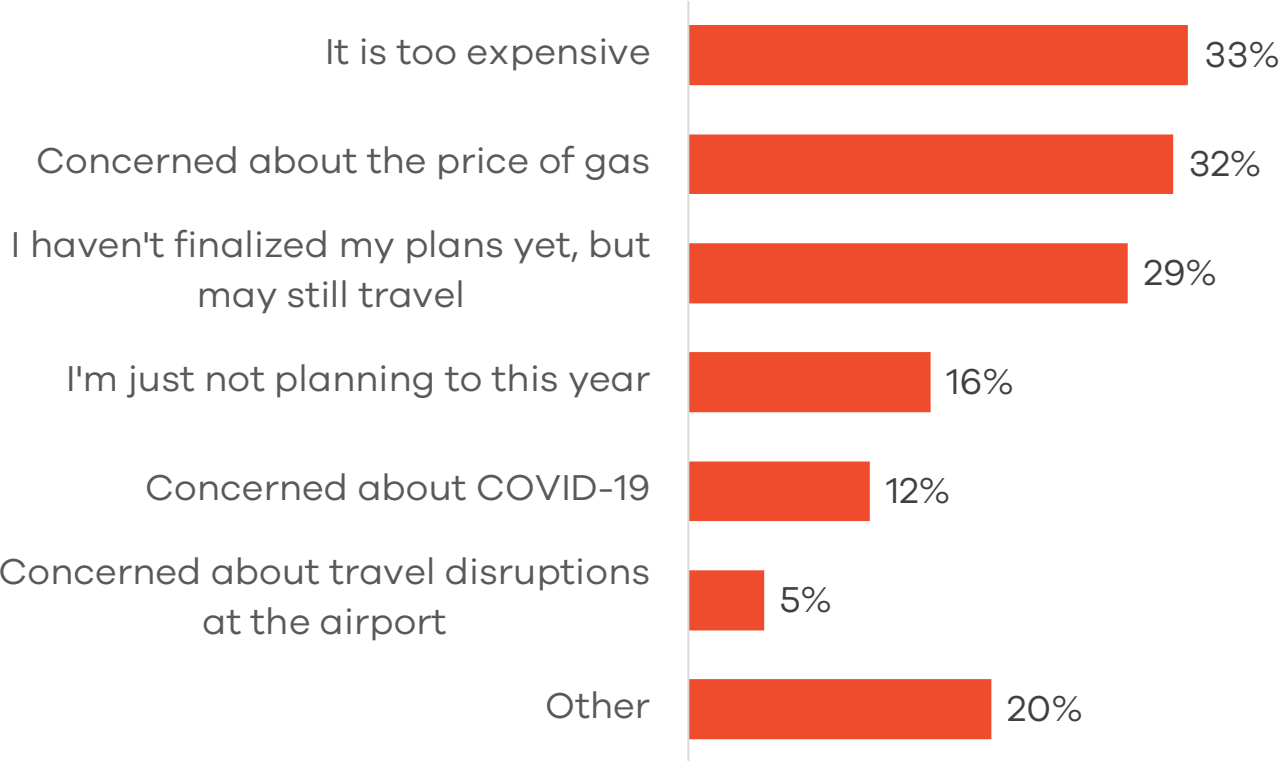
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Among Those Who Said They're Not Planning to Travel for the Winter Holidays, Only 16 Percent Typically Travel for the Winter Holidays.

16%

of those who are not planning to travel for the winter holidays indicate that they typically travel for the winter holidays.

Why Aren't You Planning to Take an Overnight Trip for the Winter Holidays This Year?*



Holiday Travel

* Small sample size – interpret with caution

Base: Likely Hawai'i Visitors who are not planning to travel for the holidays (n=172); those who typically travel for winter holidays (n=27)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Fall Module

Cruising

Ocean Cruising

67%

of Likely Hawai'i Visitors are interested in taking an ocean cruise vacation during the next two years

Interest in Ocean Cruise Lines

% Interested in Ocean Cruise Line Brands	Fall '23
Royal Caribbean Cruises	50%
Norwegian Cruise Line	41%
Carnival Cruise Line	39%
Disney Cruise Line	37%
Princess Cruises	36%
Viking Cruises	34%
Celebrity Cruises	28%
Virgin Voyages	22%
Holland America Line	20%
Windstar Cruises	16%
Crystal Cruises	15%
Silversea Cruises	15%
Regent Seven Seas Cruises	13%
Cunard Line	12%
Seabourn Cruise Line	11%
Other	3%

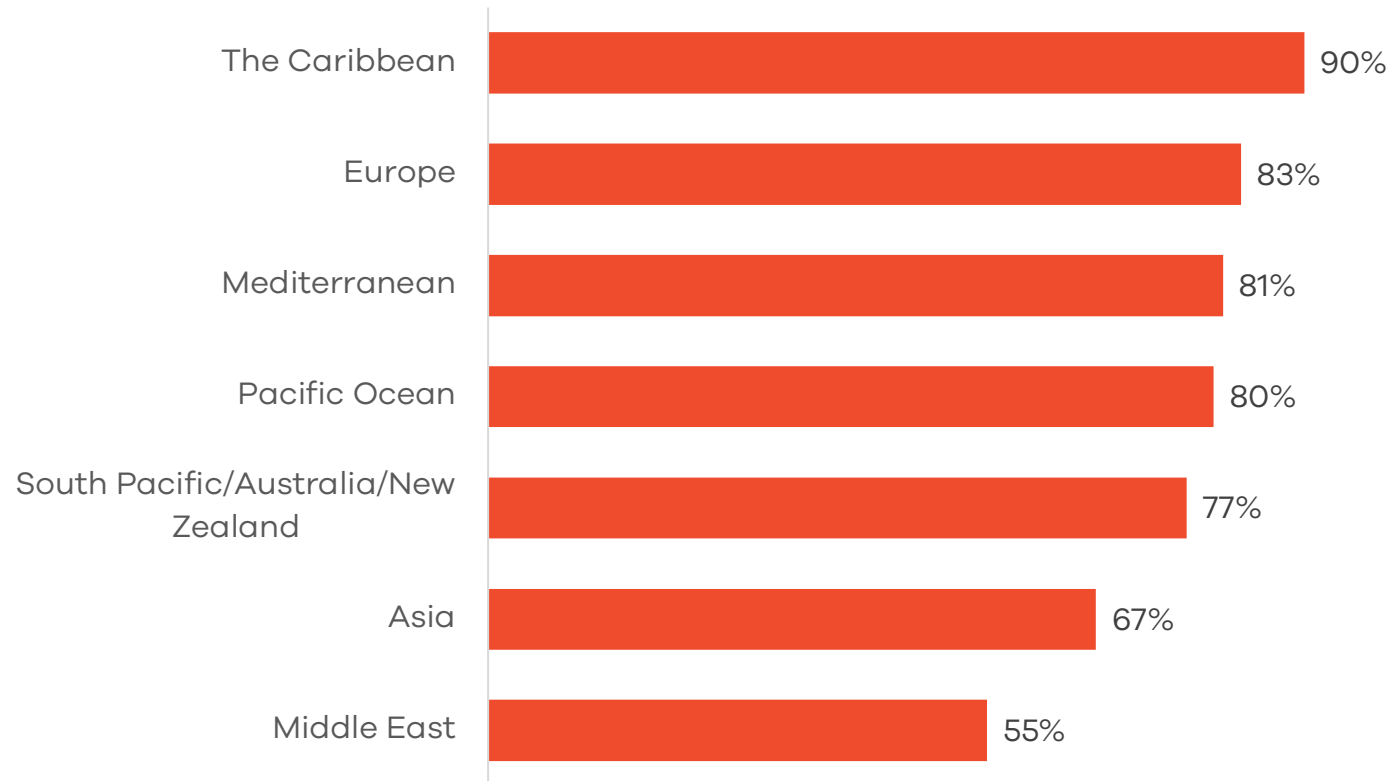
Cruising

Base: Likely Hawai'i Visitors interested in ocean cruising (n=508)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Nine in 10 of Likely Hawai'i Visitors Interested in Ocean Cruising are Interested in Cruises in the Caribbean.

% Interested in Ocean Cruising Regions



Base: Likely Hawai'i Visitors interested in ocean cruising (n=508)

46 Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"



River Cruising

65%

of Likely Hawai'i Visitors are interested in taking a river cruise vacation during the next two years

Interest in River Cruise Lines

% Interested in River Cruise Line Brands	Fall '23
Viking Cruises	50%
American Cruise Lines	31%
Emerald Cruises	26%
Scenic Luxury Cruises and Tours	21%
Riverside Luxury Cruises	21%
American Queen Voyages	19%
Avalon Waterways	19%
Grand Circle Cruise Line	18%
Aqua Expeditions	16%
Tauck	15%
AmaWaterways	14%
Vantage Deluxe World Travel	14%
Uniworld Boutique River Cruises	14%
CroisiEurope Cruises	12%
Other	2%

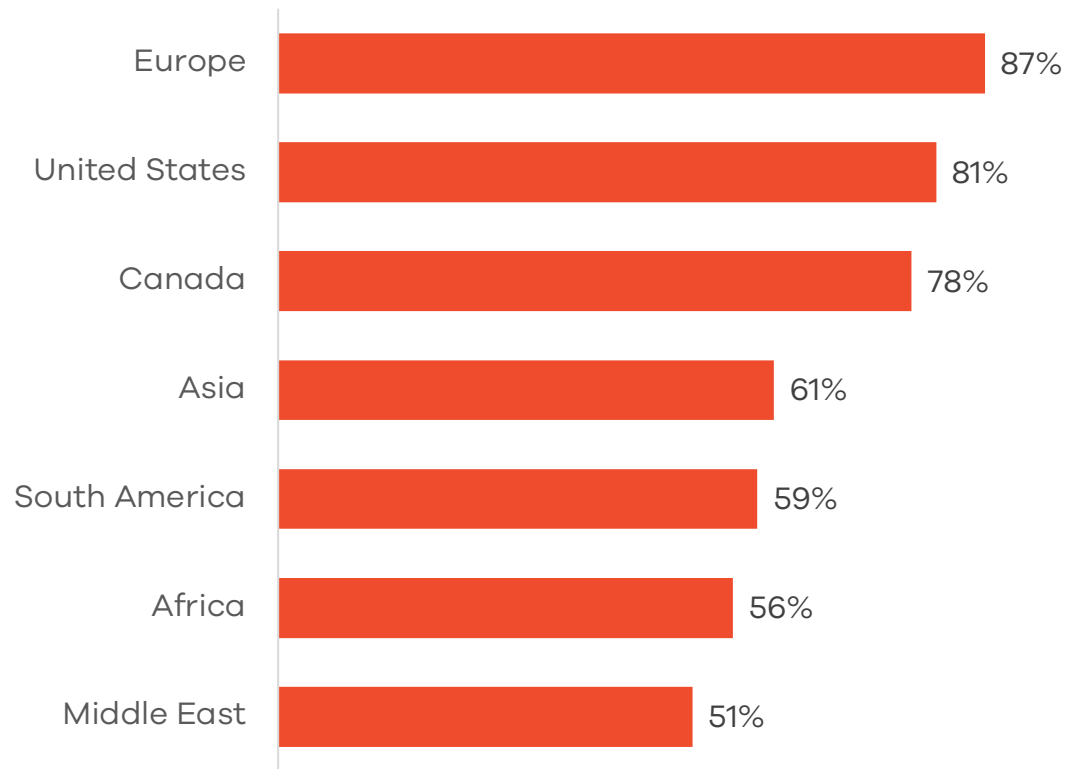
Cruising

Base: Likely Hawai'i Visitors interested in river cruising (n=495)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Europe Garnerers the Most Interest as a River Cruising Destination for Likely Hawai'i Visitors, Followed by the United States and Canada.

% Interested in River Cruising Regions



Base: Likely Hawai'i Visitors interested in river cruising (n=495)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"



Expedition Cruising



58%

of Likely Hawai'i Visitors are interested in taking an expedition cruise vacation during the next two years

Interest in Expedition Cruise Brands

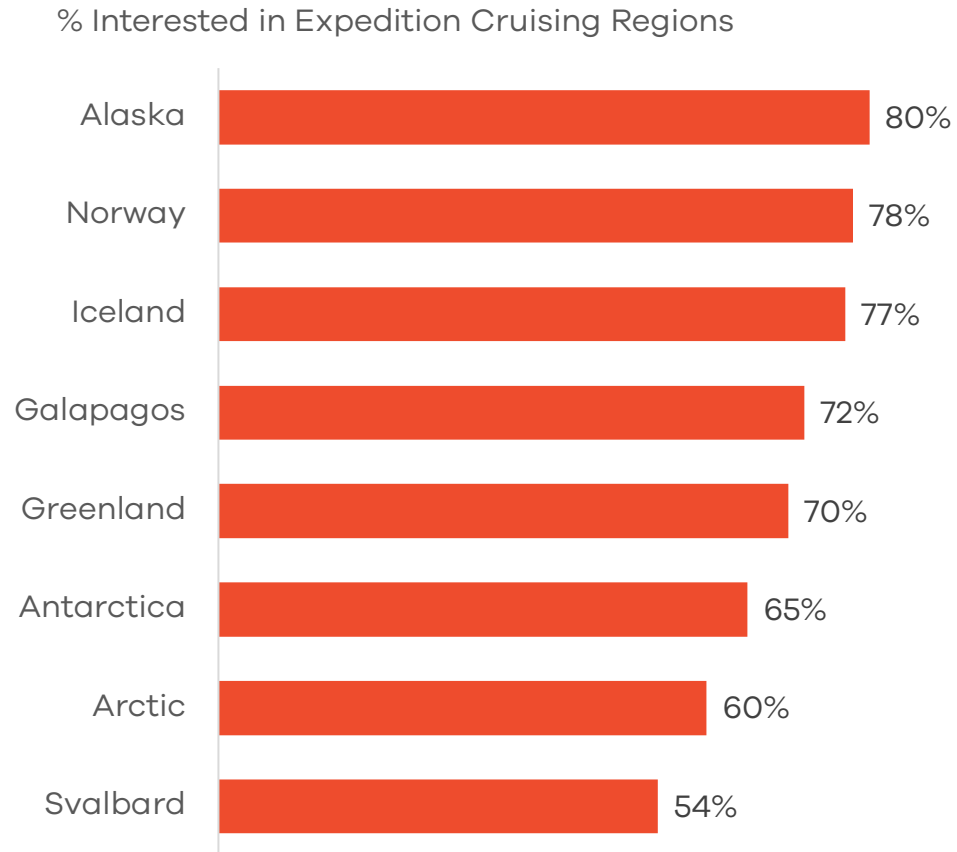
% Interested in Expedition Cruise Line Brands	Fall '23
Silversea Cruises	34%
Seabourn Expeditions	31%
Atlas Ocean Voyages	26%
Lindblad Expeditions and National Geographic	24%
Aurora Expeditions	22%
Hurtigruten	21%
UnCruise Adventures	20%
Abercrombie & Kent	19%
Quark Expeditions	16%
Ponant	11%
Other	0%

Cruising

Base: Likely Hawai'i Visitors interested in expedition cruising (n=442)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

Alaska Garner the Most Interest as an Expedition Cruising Destination for Likely Hawai'i Visitors, Followed by Norway and Iceland.



Base: Likely Hawai'i Visitors interested in expedition cruising (n=442)

50 **Source:** MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"



Price of the Cruise, Cleanliness of the Ship/Brand and Quality of the Food Available on Board are the Most Influential Factors When Selecting a Cruise Line.

Influential When Selecting a Cruise Line	Fall '23
Price of the cruise	86%
Safety/cleanliness standards of cruise ship/brand	84%
Quality of the food available on board	84%
Ports of call/available itineraries	84%
Cabin size/quality	81%
Cruise brand name/reputation	81%
Size of the cruise ship	79%
Cost/convenience of traveling to/from port of departure	78%
Quality and diversity of excursions available	73%
Previous positive experience with the cruise line	67%
Nightlife/entertainment options	67%
Luxury accommodations	64%
Proof of vaccination required	56%
Membership in cruise line loyalty program	52%
Availability of onboard gambling	48%
Children's activities	43%

Base: Likely Hawai'i Visitors interested in cruising (n=590)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"



Vacation Motivators and Activities

The Most Popular Uses of AI When Travel Planning For Likely Hawai'i Prospects Are to Research Flight Options and Generate Travel Ideas and Inspiration.

53%

of Likely Hawai'i Visitors have used ChatGPT or another AI tool for travel planning.

AI Use for Travel Planning
(Among those who have used AI for travel planning)



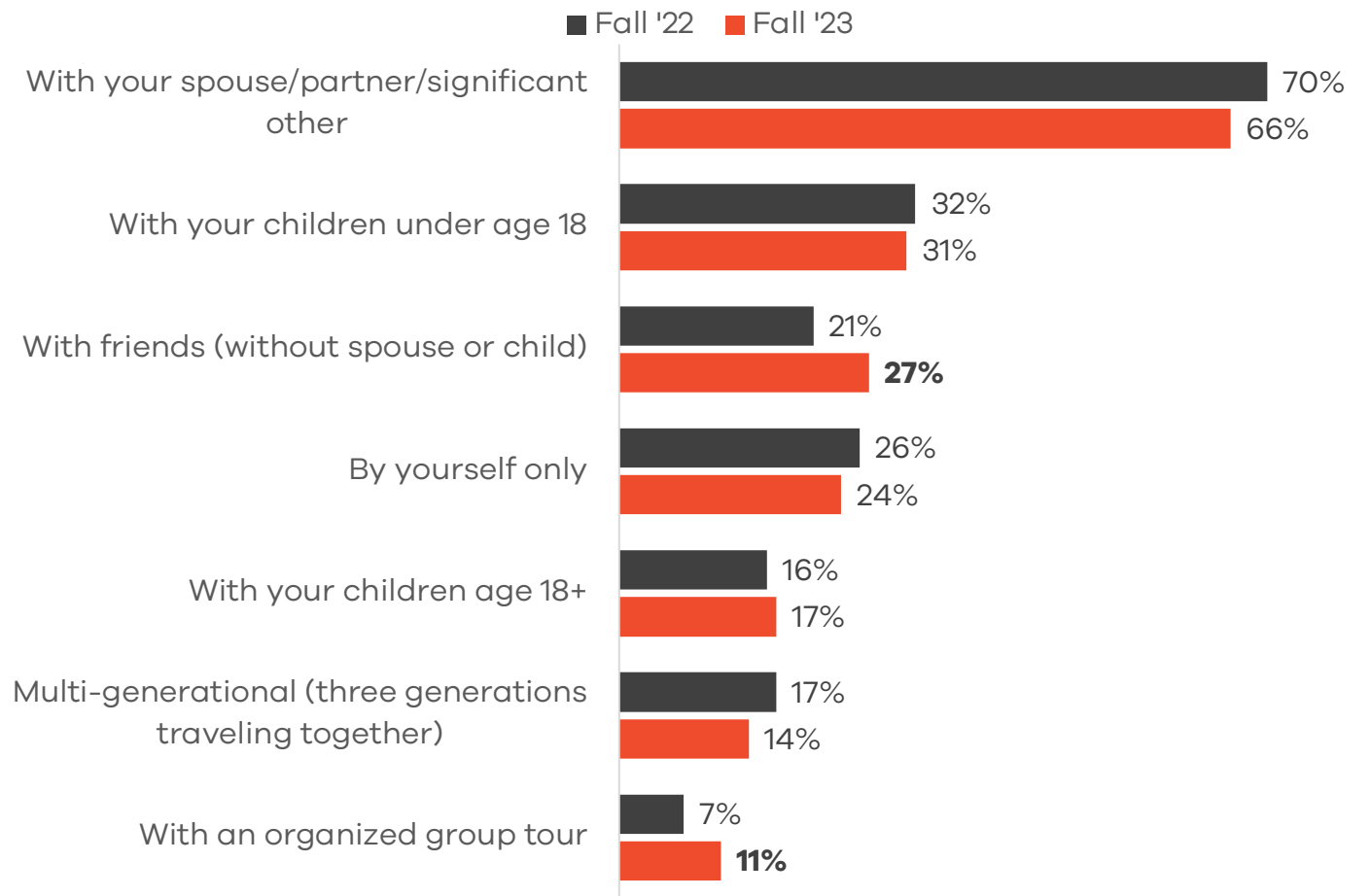
Base: Likely Hawai'i Visitors (n=758); those who have used ChatGPT or another AI tool for travel planning (n=403)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"



Traveling With Friends is up Significantly From Last Year for Likely Hawai'i Visitors.

Travel Party During the Next Six Months



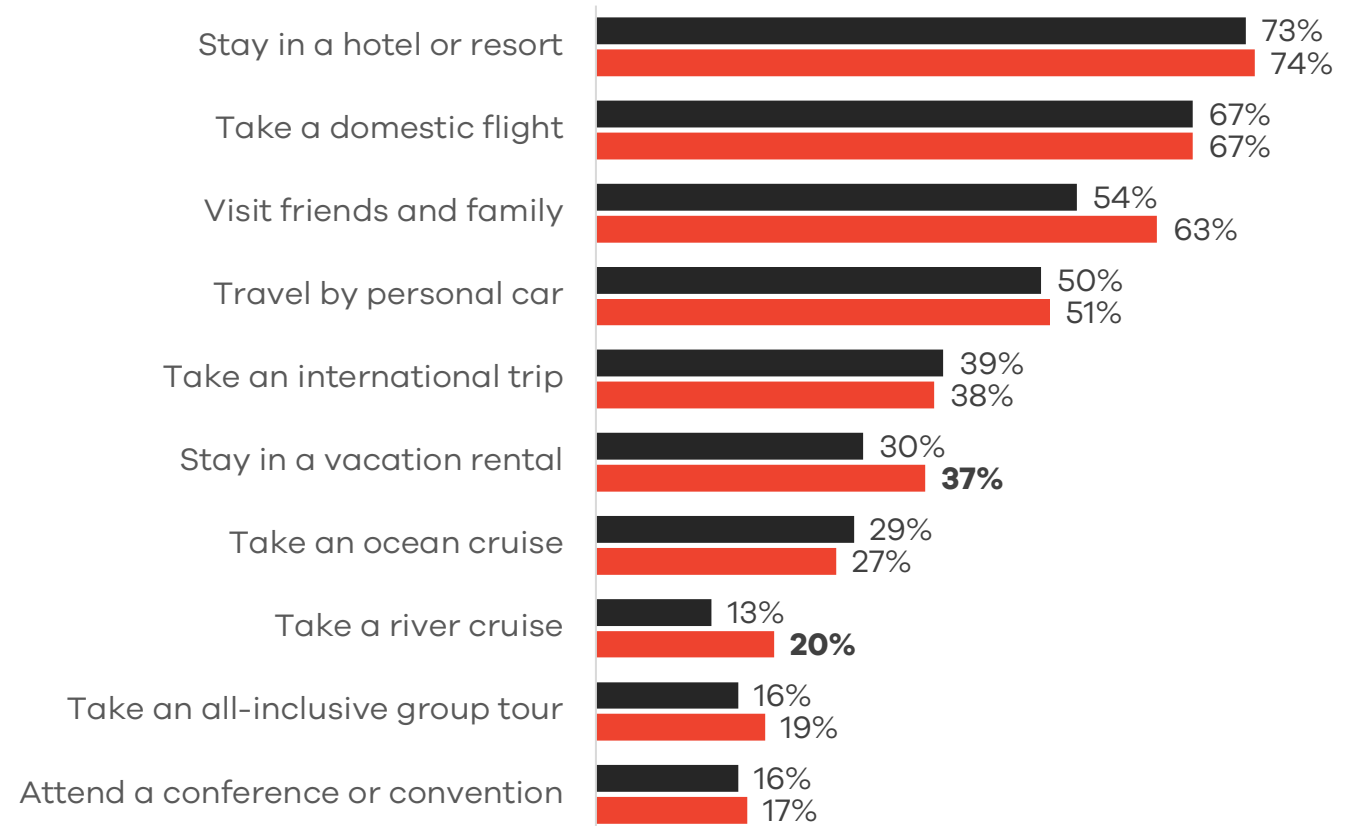
Data in bold indicates a significant difference from Fall 2022.
Base: Likely Hawai'i Visitors who intend to travel during the next six months (n=655)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"



More Than Three-Quarters Of Likely Hawai'i Visitors Are Planning To Stay In A Hotel In The Next Six Months.

Travel Expectations in the Next 6 Months

■ Fall '22 ■ Fall '23



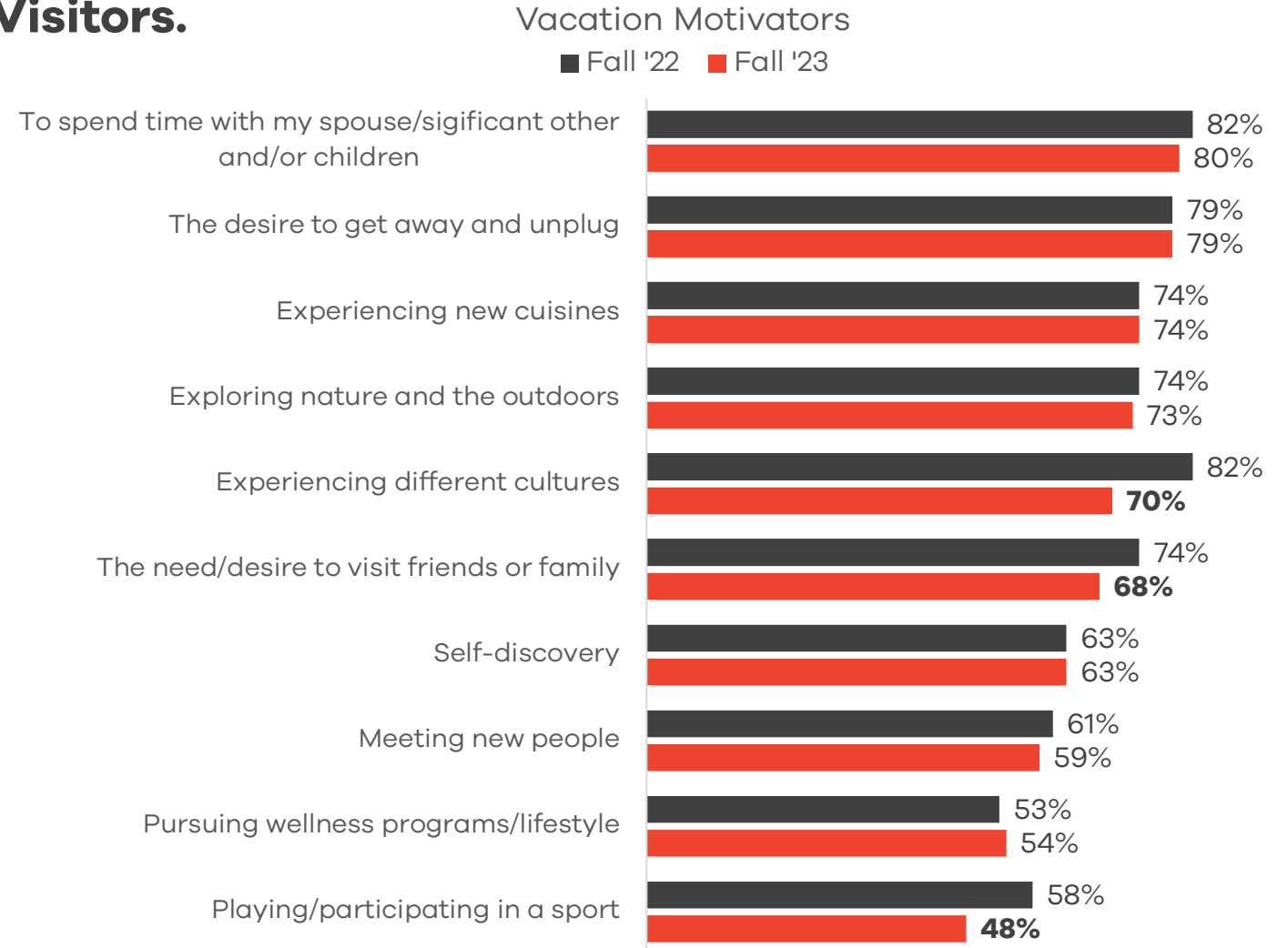
Data in bold indicates a significant difference from Fall 2022.

Base: Likely Hawai'i Visitors who intend to travel during the next six months (n=655)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"



Spending Time With Their Spouse/Significant Other And/Or Children And the Desire to Get Away and Unplug Are The Top Motivators to Travel For Likely Hawai'i Visitors.



Data in bold indicates a significant difference from Fall 2022.

Base: Likely to Visit Hawai'i (n=758)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"

What Destination Attributes Influence Choice of Destination?

Influential When Selecting a Destination	Fall '22	Fall '23
Beautiful scenery	64%	68%
Safety	52%	61%
Food and drink scene	58%	54%
Outdoor/nature activities	49%	47%
Historical significance of a destination	44%	45%
Focus on family activities	27%	37%
A sense of tradition (place family has traditionally visited)	24%	35%
The ethnic diversity and multicultural population of a destination	30%	30%
Music scene	29%	27%
The destination's reputation for environmental responsibility	21%	25%
Nightlife/bars	22%	24%
The destination's commitment to social justice and equality	23%	19%
LGBTQ+ travel offerings	10%	6%

Data in bold indicates a significant difference from Fall 2022.

- / Beautiful scenery is the top attribute travelers look for when selecting a destination.
- / Beautiful scenery, safety, food and drink scene, outdoor/nature activities and the historical significance of a destination all increased significantly compared to Fall 2022.

Activities of Interest on Vacation

	Fall '22	Fall '23
Beach experiences	51%	55%
Historical sites	48%	47%
Shopping	44%	45%
Visiting a state or national park	46%	44%
Visiting a museum	37%	39%
Visiting a theme or amusement park	34%	37%
Visiting a zoo or aquarium	33%	36%
Visiting notable architectural sites	31%	35%
Attending a concert/music festival	30%	35%
Hiking/climbing/biking/other outdoor adventures	34%	34%
Adventure travel (safaris, mountain climbing, trekking vacations, etc.)	29%	34%
Food tours	NA	33%
Guided tours with access to local experiences that are otherwise inaccessible	36%	31%
Attending a sporting event	23%	30%
Nightlife	29%	27%
Dinner theatre	27%	26%
Cooking, wine or cocktail class	NA	26%
Camping	22%	25%
Casino gambling	27%	24%
Water sports (waterskiing, boating/rafting)	28%	23%
Exploring family's ancestry/past on a heritage vacation	22%	23%
Spa Services (massages, facials, etc.)	20%	22%
Attending performing arts events	19%	21%
Film/art festivals	20%	20%
Snow skiing/snowboarding	15%	18%
Playing golf	18%	17%
Scuba diving	15%	15%
Playing tennis	12%	14%
Surfing	11%	14%

- / Beach experiences, historical sites, shopping and visiting a state or national park are the top activities Likely Hawai'i Visitors look for when selecting a destination.
- / Interest in beach experiences, visiting notable architectural sites, attending concert/music festivals, adventure travel, attending sporting events, snow skiing/snowboarding and surfing increased significantly compared to last year.

Data in bold indicates a significant difference from Fall 2022.

Base: Likely to Visit Hawai'i (n=758)

Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"



THANK YOU

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